



# Florida Public Pension Trustees Association

## *Spring Trustee School Program Agenda*

**April 2021**

**Basic Course April 20—21**

**Intermediate Course April 21—22**

**Advanced Course April 22—23**





	<b>Basic</b> <b>Basic Course April 20</b> <b>Review and Exam April 21</b>	<b>Intermediate</b> <b>Intermediate Course April 21</b> <b>Review and Exam April 22</b>	<b>Advanced</b> <b>Advanced Course April 22</b> <b>Review and Exam April 23</b>
8:30—9:00 am	<b>Board Meeting Basics</b>  <i>Steve Corbet, CPPT</i> <i>FPPTA Education Committee</i> <span style="float: right;">1</span>	<b>International Investments: Why &amp; How</b>  <i>Kurt Wood</i> <i>DePrince, Race &amp; Zollo</i> <span style="float: right;">15</span>	<b>Review of Risk &amp; Volatility</b>  <i>Steve Roth</i> <i>Dahab Associates</i> <span style="float: right;">28</span>
	<b>The Administrator</b>  <i>Scott Baur</i> <i>Resource Centers</i> <span style="float: right;">2</span>	<b>An Introduction to Alternative Investments</b>  <i>David Lebovitz</i> <i>JP Morgan Asset Management</i> <span style="float: right;">16</span>	<b>Emerging Markets Equity</b>  <i>Guilherme Valle</i> <i>ABS Investment Management</i> <span style="float: right;">29</span>
	<b>The Actuary</b>  <i>Eric Atwater &amp; Bryan Falato</i> <i>Aon</i> <span style="float: right;">3</span>	<b>Equity Managers Meeting Report</b>  <i>Kitty Martin</i> <i>Nuveen</i> <span style="float: right;">17</span>	<b>Real Assets</b>  <i>Bill Adams</i> <i>Mellon</i> <span style="float: right;">30</span>
10:00—10:15 am	<b>Morning Break</b>		
	<b>The Attorney</b>  <i>Ricki Levy, Esq. CPPT</i> <i>Lorium Law</i> <span style="float: right;">4</span>	<b>The Actuarial Report</b>  <i>Joe Griffin</i> <i>Foster &amp; Foster Consulting Actuaries</i> <span style="float: right;">18</span>	<b>Private Assets</b>  <i>Dan Clare</i> <i>Constitution Capital Partners</i> <span style="float: right;">31</span>
	<b>The Custodian</b>  <i>Mark Rhein</i> <i>Salem Trust Company</i> <span style="float: right;">5</span>	<b>The Fixed Income Manager Report</b>  <i>Pat Kelly</i> <i>Agincourt Capital Management</i> <span style="float: right;">19</span>	<b>Establishing a Funding Policy</b>  <i>Peter Strong</i> <i>GRS</i> <span style="float: right;">32</span>
	<b>The Investment Consultant</b>  <i>Kerry Richardville</i> <i>AndCo Consulting</i> <span style="float: right;">6</span>	<b>Investment Consultant/ Asset Allocation Recommendation</b>  <i>Frank Wan</i> <i>Burgess Chambers &amp; Assoc.</i> <span style="float: right;">20</span>	<b>Impact of Changing Actuarial Assumptions</b>  <i>Chad Little</i> <i>Freiman Little Actuaries</i> <span style="float: right;">33</span>
	<b>The Role of an Investment Manager</b>  <i>Mary Byrom</i> <i>Atlanta Capital Management</i> <span style="float: right;">7</span>	<b>Investment Consultant / Manager Search Report</b>  <i>Scott Owens</i> <i>Graystone Consulting</i> <span style="float: right;">21</span>	<b>Ethics Case Studies: Conflict of Interest</b>  <i>Caroline Klancke</i> <i>State of Florida Ethics</i> <span style="float: right;">34</span>
12:15—1:15 pm	<b>Break for Lunch</b>		



	Basic	Intermediate	Advanced
	<b>Capital Markets—Equity</b>  <i>Keri Hepburn</i> <i>Aristotle Capital Management</i> 8	<b>Chapter 112, 175, 185</b>  <i>Adam Levinson, Esq.</i> <i>Klausner Kaufman Jensen &amp; Levinson, PA</i> 22  <b>Disability Process</b>  <i>Pedro Herrera, Esq.</i> <i>Sugarman &amp; Susskind, PA</i> 23	<b>Modification of Pension Plans</b>  <i>Mark Floyd, Esq.</i> <i>Mierzwa &amp; Floyd, PA</i> 35
	<b>Capital Markets - Fixed Income</b>  <i>Paul Lundmark, CPPT</i> <i>Richmond Capital Management</i> 9		<b>What a Ride It Has Been! What Now For Growth Investing</b>  <i>Anthony Xuereb</i> <i>Polen Capital Management</i> 36
	<b>Introduction to Real Estate Investments</b>  <i>Meredith Despins</i> <i>Nareit</i> 10		<b>Fixed Income in a Low Interest Rate Environment</b>  <i>Jeff Detwiler</i> <i>Garcia Hamilton</i> 37
	<b>Introduction to Ethics</b>  <i>Kenneth Harrison, Esq., CPPT</i> <i>Sugarman &amp; Susskind, PA</i> 11	<b>Investment Consultant Meeting Report</b>  <i>Greg White</i> <i>Investment Performance Services, LLC</i> 24	<b>Building and Managing Your Real Estate Portfolio</b>  <i>Richelle Cook, CPPT</i> <i>American Realty</i> 38
3:15—3:30 pm	<b>Afternoon Break</b>		
	<b>Modern Portfolio Theory &amp; Benchmarking</b>  <i>Steve Roth, CPPT</i> <i>Dahab Associates</i> 12	<b>Managing Your Service Providers</b>  <i>Dwight Mattingly, CPPT</i> <i>FPPTA Education Committee</i> 25	<b>Asset Allocation and Rebalancing</b>  <i>Aaron Lally</i> <i>Meketa Investment Group</i> 39
	<b>Investment &amp; Economic Cycles</b>  <i>Steve Stack</i> <i>Highland Capital Management</i> 13	<b>Pension Plan Data Center</b>  <i>Fred Nesbitt, PhD. &amp; Sean McKinstry, CPPT</i> <i>FPPTA Education Committee</i> 26	<b>Why Securities Litigation</b>  <i>Maya Saxena, Esq.</i> <i>Saxena White, PA</i> 40
	<b>Diversifying Your Equity Portfolio</b>  <i>Jason Turner</i> <i>Great Lakes Advisors</i> 14	<b>Using Social Media Responsibly</b>  <i>Sean McKinstry, CPPT &amp; Susan Marden, FPPTA</i> 27	<b>Hollywood Case Study</b> <i>Phyllis Shaw, CPPT,</i> <i>Christopher Cassidy CPPT,</i> <i>George R. Keller, Jr. CPPT,</i> <i>Christine Bailey CPPT</i> <i>Hollywood General Employees</i> 41
<b>Review sessions and Exams:</b> Basic Q&A and exam will be Wednesday at 10 am, Intermediate Q&A and exam will be Thursday at 10 am, Advanced Q&A and exam will be Friday at 10 am. The Q&A sessions will be done with Zoom to allow for interaction with the presenters.			

## Review and Exams

We want to thank you for participating in our first online CPPT program.

The FPPTA has worked hard to give all members the ability to continue their education by providing the CPPT program as an online event. You will receive an email with a link and instructions to attend the day of your CPPT track (Basic, Intermediate, Advanced) is scheduled. We have a live interactive Q&A session scheduled the morning after you attend the course sessions. Each Q&A session will begin at 10 am with the exam followed directly after. The live Q&A will be conducted by your CPPT committee members and speakers. The exam will follow the review session. You will be provided a link and will have two hours to complete the exam.

**A huge thank you to our program committee members!  
Without you this would not be possible.**

### **Basic Committee Members**

*Debbie McCoy, CPPT*

*Ann Thompson, CPPT*

*Steve Aspinall, CPPT*

### **Intermediate Committee Members**

*Lynn Bernstein, CPPT*

*Warren West, CPPT*

*Katie Byrne, CPPT*

### **Advanced Committee Members**

*Sean McKinstry, CPPT*

*Phyllis Shaw, CPPT*

*Steve Roth, CPPT*

## Upcoming Events

### **37th Annual Conference**

Omni Orlando

ChampionsGate Resort

June 27—June 30, 2021

### **Fall Trustee School**

Sawgrass Marriott Golf  
Resort

October 3—6, 2021

### **Winter Trustee School**

Hilton Lake Buena Vista

January 23—26, 2022

[www.fppta.org](http://www.fppta.org)  
1-800-842-4064

