



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



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

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

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 before your CPPT track (Basic, Intermediate, Advanced) is scheduled. We have a live interactive review session scheduled the morning after you attend the course sessions. Each review session will begin at 9 am with the exam followed directly after. The live review 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 three 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
1-800-842-4064

