



Florida Public Pension Trustees Association

Spring Trustees School CEU Program Program Agenda



Virtual CEU Program May 18 & 19, 2021



Spring Trustees School—CEU Program

Tuesday, May 18, 2021



Module One

8:30—10:00 AM

Welcome— Kim Prior, FPPTA CEO

Retirement Insecurity 2021—Americans' Views of Retirement

Tyler Bond, Research Manager, National Institute on Retirement Systems (NIRS)

US Demographics: Not all Doom & Gloom

Jeffrey Schulze, Investment Strategist, Clearbridge Investments

FPPTA Economic Overview

Moderator—Ron Insana, Senior Advisor to Schroders & CNBC Contributor

Alicia Levine, Chief Strategist, BNY Mellon Investment Management

David Lebovitz, Global Market Strategist, JP Morgan Asset Management

10:00—10:30 AM Morning Break

Module Two

10:30 AM—12:00 PM

Equity Markets: What Lies Ahead?

Moderator—Mary Byrom, FPPTA Education Committee

David Settles, State Street Global Advisors

Bill Adams, Mellon

Robert Fallia, Lazard Asset Management

Fixed Income and Income Alternatives

Moderator—Meredith Despina, FPPTA Education Committee

Paul Lundmark, Richmond Capital Management

Dan Johnson, AndCo Consulting

Dan Clare, Constitution Capital Partners



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Module Two, Continued

Alternative Asset Class Opportunities for DB Plans

Moderator—Tyler Grumbles, AndCo Consulting
Paul Nasser, Intercontinental Real Estate
Meena Ghandi, JP Morgan Asset Management
Brian Casey, Cohen & Steers

12:00—1:00 pm Break for Lunch

Module Three

1:00—1:30 PM

Social Security Update

Kurt Czarnowski, Social Security Specialist

Module Four

1:30—3:00 PM

Tallahassee Legislative Report

Moderator—Fred Nesbitt, FPPTA Education Committee
Dwight Mattingly, FPPTA Board of Directors
Chris Spencer, FPPTA Board of Directors

FPPTA New Initiative—Building a Grass Roots Communication Network

Moderator—Fred Nesbitt, FPPTA Education Committee
Dwight Mattingly, FPPTA Board of Directors
Chris Spencer, FPPTA Board of Directors
Tom Lussier, The Lussier Group

Federal Legislative—Public Pension Update

Moderator—Fred Nesbitt, FPPTA Education Committee
Tom Lussier, The Lussier Group



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Module Five

8:30—10:00 AM

Understanding Your Plan's Data—How Do You Stack Up?

Fred Nesbitt, FPPTA Education Committee
Sean McKinstry, FPPTA Education Committee

Pension Plan Funding

Hank Kim, NCPERS
Fred Nesbitt, FPPTA Education Committee

Local Financing of Florida Pension Plans

Moderator—Fred Nesbitt, FPPTA Education Committee
Susan Grant, City of Fort Lauderdale
Paul Shamoun, Florida League of Cities
J. Scott Bayne, Fort Lauderdale Firefighters Local 765

10:00—10:30 AM Morning Break

Module Six

10:30 AM—12:00 PM

Beyond the Arc—Creative Funding Strategies in the Public Sector

Dan Doonan, National Institute on Retirement Security (NIRS)

Key Concepts—Pension Obligation Bonds

Moderator—Mark Meyer, FPPTA Education Committee
Jim Link, PFM Management
Ron Ryan, Ryan ALM

Expected ROR Assumptions

Dave West, AndCo Consulting

Around the Horn—Actuarial Panel

Moderator—Mark Meyer, FPPTA Education Committee
James Rizzo, GRS
Brad Heinrichs, Foster & Foster



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12:00—1:00 pm Break for Lunch

Module Seven

1:00—1:30 PM

Cyber Security—DOL Tips for Retirement Plans

John Reidy, Principal, Pension Technology Group

Module Eight

1:30—3:00 PM

Moderator—Steve Corbet, Vice—Chairman, FPPTA Education Committee

Securities Litigation

Pedro Herrera, Sugarman & Susskind

Virtual Meetings & E-Verify & DOL Best Practices

Bonnie Jensen, Klausner, Kaufman, Jensen & Levinson

Pension Forfeitures

Ron Cohen, Lorium Law

Senate Bill 84

Mark Floyd, Mierswa & Floyd

Legal Round Table—Live Q & A Session

Moderator—Ken Harrison, FPPTA Education Committee

Pedro Herrera, Sugarman & Susskind

Bonnie Jensen, Klausner, Kaufman, Jensen & Levinson

Ron Cohen, Lorium Law

Mark Floyd, Mierswa & Floyd



Spring Trustees School—CEU Program



Thank you for attending our Virtual Spring Trustees School CEU Program. We hope you enjoyed it. If you are CPPT this event has earned you 10 CEU credits for 2021. Your records will automatically be updated in our database.

Hopefully you saw the announcements that we are hosting our 37th Annual Conference in person at the beautiful Omni Orlando at ChampionsGate. The date are June 27—30, 2021.

Our next Trustees School will be held October 3—6, 2021 at Sawgrass Marriott Resort. We will be offering five or more concurrent sessions for you the enjoy.

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