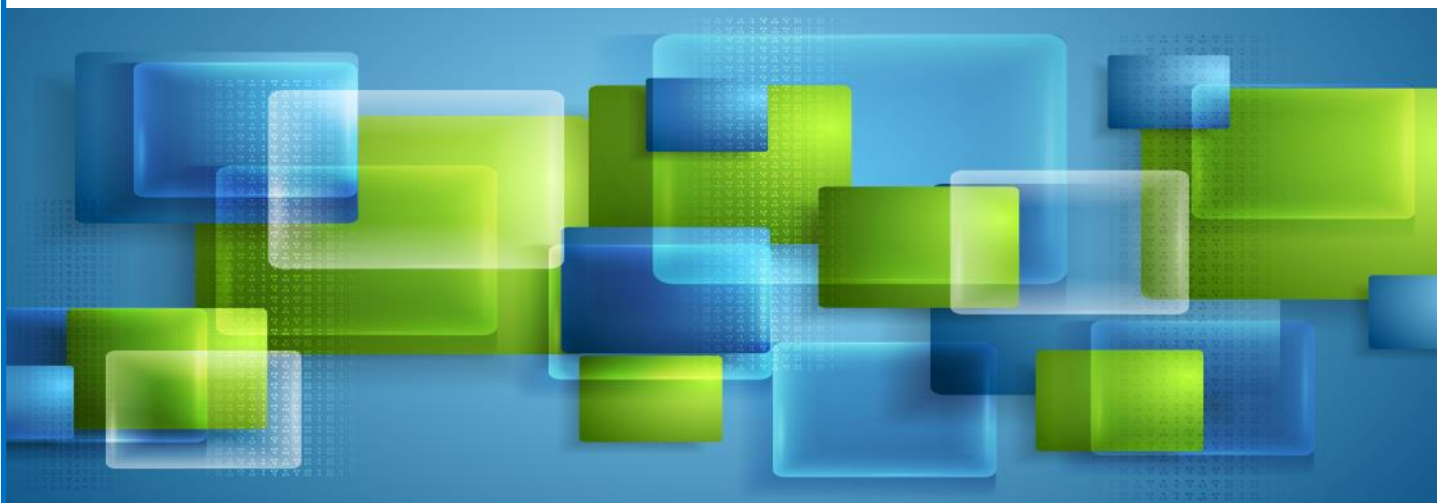




Florida Public Pension Trustees Association

# Winter Trustee School Program Agenda



January 23—26, 2022

Hilton Lake Buena Vista  
Orlando, Florida

**Saturday, January 22, 2022**

2:00 pm Board of Directors Meeting in Poinsettia/Quince

**Sunday, January 23, 2022**

3:00—6:00 pm Trustee School Registration in International Foyer  
4:15—5:00 pm New Member Orientation in Grand Salon I  
5:00—7:00 pm Welcome Gathering in International Ballroom

**CPPT Program**  
**Monday, January 24, 2022**

**7:30 am—3:00 pm Registration Open \* 7:30 am—8:30 am Continental Breakfast**  
**International & Grand Ballrooms Foyer**

<b>Attendance Check-In must be completed by 8:15 am</b>	<b>Basic Grand Salon 1</b>	<b>Intermediate Grand Salon 2</b>	<b>Advanced Grand Salon 6</b>
8:30—9:30 am	<b>Board Meeting Basics</b> <i>Steve Corbet, CPPT</i> <i>FPPTA Education Committee</i>	<b>Disability Process</b> <i>Pedro Herrera, Esq.</i> <i>Sugarman &amp; Susskind, PA</i>	<b>Review of Risk &amp; Volatility</b> <i>Steve Roth</i> <i>Dahab Associates</i>
9:35—10:15 am	<b>The Administrator</b> <i>Scott Baur</i> <i>Resource Centers</i>	<b>International Investments: Why &amp; How</b> <i>Kurt Wood</i> <i>DePrince, Race &amp; Zollo</i>	<b>Emerging Markets Equity</b> <i>Natascha Willans</i> <i>ABS Global Investment Management</i>
10:15—10:35 am	<b>Morning Refreshment Break—International &amp; Grand Ballrooms Foyer</b>		
10:40—11:20 am	<b>The Actuary</b> <i>Eric Atwater</i> <i>Aon</i>	<b>Equity Managers Meeting Report</b> <i>Lisa George</i> <i>Nuveen</i>	<b>Modification of Pension Plans</b> <i>Mark Floyd, Esq.</i> <i>Mierzwa &amp; Floyd, PA</i>
11:25 am —12:05 pm	<b>The Role of an Investment Manager</b> <i>Mary Byrom</i> <i>Atlanta Capital Management</i>	<b>The Actuarial Report</b> <i>Joe Griffin</i> <i>Foster &amp; Foster Consulting Actuaries</i>	<b>Private Assets</b> <i>Dan Clare</i> <i>Constitution Capital Partners</i>
12:05—1:20 pm	<b>Break for Lunch in Tournament Hall—Advisory Board Meeting Poinsettia &amp; Quince</b> (Attendance Check-In must be completed by 1:15 pm)		
1:25—2:05 pm	<b>The Custodian</b> <i>Mark Rhein</i> <i>Salem Trust Company</i>	<b>An Introduction to Alternative Investments</b> <i>Jordan Jackson</i> <i>JP Morgan Asset Management</i>	<b>Asset Allocation and Rebalancing</b> <i>Aaron Lally</i> <i>Meketa Investment Group</i>
2:10—2:50 pm	<b>The Investment Consultant</b> <i>Kerry Richardville</i> <i>AndCo Consulting</i>	<b>Investment Consultant / Asset Allocation Recommendation</b> <i>Mitchell Brennan</i> <i>Burgess Chambers &amp; Assoc.</i>	<b>Impact of Changing Actuarial Assumptions</b> <i>Chad Little</i> <i>Freiman Little Actuaries</i>
2:50—3:10 pm	<b>Afternoon Refreshment Break in International &amp; Grand Ballrooms Foyer</b>		
3:15—3:55 pm	<b>The Attorney</b> <i>Ricki Levy, Esq. CPPT</i> <i>Lorium Law</i>	<b>Investment Consultant / Manager Search Report</b> <i>Scott Owens</i> <i>Graystone Consulting</i>	<b>Ethics Case Studies: Conflict of Interest</b> <i>Gray Schafer</i> <i>State of Florida Ethics Commission</i>
4:00—5:00 pm	<b>BASIC REVIEW</b> Debbie McCoy, CPPT Ann Thompson, CPPT Steve Aspinall, CPPT	<b>INTERMEDIATE REVIEW</b> Lynn Bernstein, CPPT Warren West, CPPT Katie Byrne, CPPT	<b>ADVANCED REVIEW</b> Steve Roth, CPPT Phyllis Shaw, CPPT Chris Spencer, CPPT
4:30—11:00 pm	<b>Hospitality Room and Study Hall in Kahili &amp; Lily</b>		

# CPPT Program

Tuesday, January 25, 2022

7:30 am—3:00 pm Registration Open \* 7:30 am—8:30 am Continental Breakfast  
International & Grand Ballrooms Foyer

Attendance Check-In must be completed by 8:15 am	Basic Grand Salon 1	Intermediate Grand Salon 2	Advanced Grand Salon 6
8:30—9:30 am	<b>Capital Markets—Equity</b> <i>Geoff Gerber</i> <i>Twin Capital Management</i>	<b>Chapter 112, 175, 185</b> <i>Adam Levinson, Esq.</i> <i>Klausner Kaufman Jensen &amp; Levinson, PA</i>	<b>Real Assets</b> <i>Bill Adams</i> <i>Newton Investment Management</i>
9:35—10:15 am	<b>Capital Markets - Fixed Income</b> <i>Paul Lundmark, CPPT</i> <i>Richmond Capital Management</i>	<b>Using Social Media Responsibly</b> <i>Sean McKinstry, CPPT</i> <i>Susan Marden</i> <i>FPPTA Education Committee</i>	<b>What a Ride It Has Been! What Now For Growth Investing</b> <i>Brian Smith</i> <i>Polen Capital Management</i>
10:15—10:35 am	<b>Morning Refreshment Break—International &amp; Grand Ballrooms Foyer</b>		
10:40—11:20 am	<b>Introduction to Real Estate Investments</b> <i>Scott Greenberg</i> <i>Manulife</i>	<b>The Fixed Income Manager Report</b> <i>Pat Kelly</i> <i>Agincourt Capital Management</i>	<b>Fixed Income in a Low Interest Rate Environment</b> <i>Jeff Detwiler</i> <i>Garcia Hamilton</i>
11:25 am—12:05 pm	<b>Introduction to Ethics</b> <i>Kenneth Harrison, Esq., CPPT</i> <i>Sugarman &amp; Susskind, PA</i>	<b>Investment Consultant Meeting Report</b> <i>Greg White</i> <i>Investment Performance Services, LLC</i>	<b>Building and Managing Your Real Estate Portfolio</b> <i>Richelle Cook, CPPT</i> <i>American Realty</i>
12:05—1:20 pm	<b>Break for Lunch in Tournament Hall—Education Committee Meeting Poinsettia &amp; Quince</b> (Attendance Check-In must be completed by 1:15 pm)		
1:25—2:05 pm	<b>Modern Portfolio Theory &amp; Benchmarking</b> <i>Steve Roth, CPPT</i> <i>Dahab Associates</i>	<b>Real Estate Performance Report</b> <i>Deb Schwartz</i> <i>BARINGS</i>	<b>Establishing a Funding Policy</b> <i>Peter Strong</i> <i>GRS</i>
2:10—2:50 pm	<b>Investment &amp; Economic Cycles</b> <i>Steve Stack</i> <i>Highland Capital Management</i>	<b>Pension Plan Data Center</b> <i>Fred Nesbitt, PhD.</i> <i>Sean McKinstry, CPPT</i> <i>FPPTA Education Committee</i>	<b>Why Securities Litigation</b> <i>Marrisa DeMato, Esq.</i> <i>Saxena White, PA</i>
2:50—3:10 pm	<b>Afternoon Refreshment Break in International &amp; Grand Ballrooms Foyer</b>		
3:15—3:55 pm	<b>Diversifying Your Equity Portfolio</b> <i>Jason Turner</i> <i>Great Lakes Advisors</i>	<b>Managing Your Service Providers</b> <i>Dwight Mattingly, CPPT</i> <i>FPPTA Education Committee</i>	<b>Becoming an Educator</b> <i>Mike Spencer, CPPT</i> <i>Sean McKinstry, CPPT</i> <i>FPPTA</i>
4:00—5:00 pm	<b>Basic Review</b>	<b>Intermediate Review</b>	<b>Advanced Review</b>
	<b>Exams will start promptly at 8 am. Exams are being offered online which requires a laptop or tablet device. Upon completion of the exam you will receive your results immediately. You will also have the opportunity to see what questions you may have missed.</b>		
4:30—11:00 pm	<b>Hospitality Room and Study Hall in Kahili &amp; Lily</b>		

**Wednesday, January 26, 2022**  
**7:00 am—9:00 am Continental Breakfast**  
**International & Grand Ballrooms Foyer**

	<b>Basic Grand 1</b>	<b>Intermediate Grand 2</b>	<b>Advanced Grand 6</b>
8:00— 9:00 am  <b>Attendance Check-In must be completed by 7:45 am</b>	<i>Exams will start promptly at 8 am. Exams are being offered online which requires a laptop or tablet device. Upon completion of the exam you will receive your results immediately. You will also have the opportunity to see what questions you may have missed.</i>		
	<b>General Session Grand Salon 4 &amp; 5</b>		
9:00— 10:00 am  <b>Attendance Check-In must be completed by 8:45 am</b>			

## Information You Need to Know

**FPPTA Attendance Policy:** We ask all attendees to check-in first thing each morning (no later than 8:15 am) and to check in at the first session following lunch each day. You must sign out after the last session each day. Proper codes will be available in every room. Daily check-in and check-out was implemented to preserve the integrity and more efficiently track attendance related to our CPPT Program. Thank you for your support and cooperation. **PLEASE remember...**all sessions offered have limited room capacity. Your cooperation regarding room capacity is truly appreciated.

**CEU Credits:** You will earn ten (10) CEUs for attending this Trustee School providing you sign in and out daily. You **MUST** attend the complete session on Wednesday before signing out.

**Membership Note:** It is the FPPTA's objective to provide the best education possible to its membership. Providing education has many variables, so if you have any suggestions to improve our education programs, please feel free to contact Peter Hapgood, the FPPTA's Director of Education, at [peterhapgood@fppta.org](mailto:peterhapgood@fppta.org) or by calling 508-612-2817.

**Hotel Reminder:** Please understand that the FPPTA does not control room temperature. It would be appreciated that all attendees come prepared for a cooler room than most anticipate. Please bring a sweater or jacket.

**Disclaimer:** The information in this program and related materials, unless otherwise noted, are the property of the individual presenters and is provided for educational purposes only. The information is provided "as is" without warranty of any kind.

**www.fppta.org**  
**1-800-842-4064**

