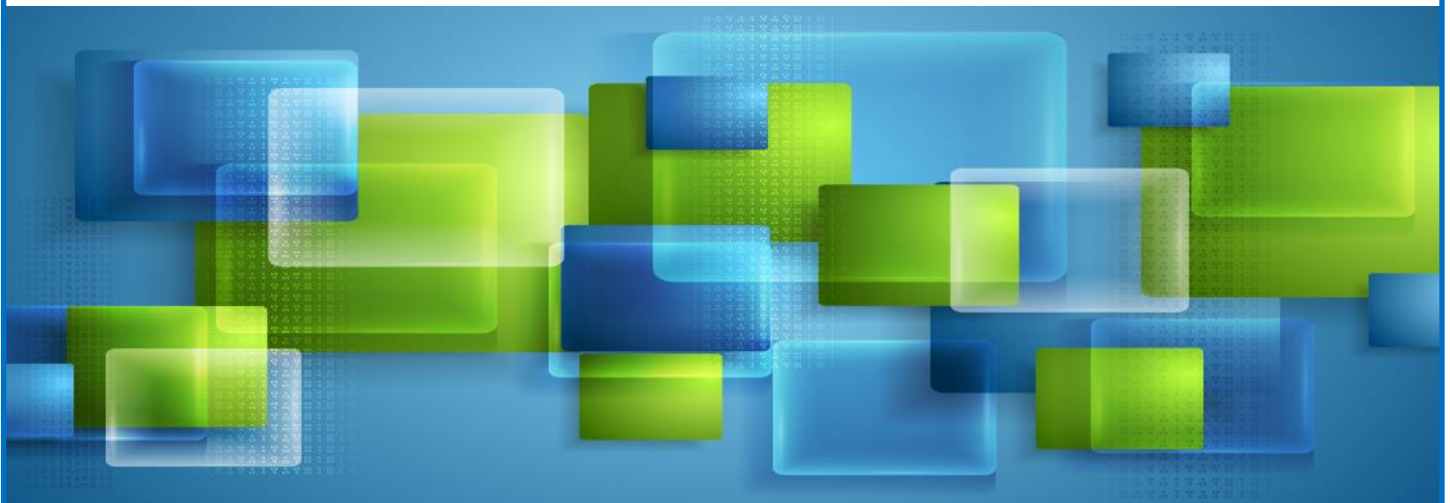




Florida Public Pension Trustees Association

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

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

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

<i>Attendance Check-In must be completed by 8:15 am</i>	Basic Grand Salon 1	Intermediate Grand Salon 2	Advanced Grand Salon 6
8:30—9:30 am	Capital Markets—Equity <i>Geoff Gerber Twin Capital Management</i>	Chapter 112, 175, 185 <i>Adam Levinson, Esq. Klausner Kaufman Jensen & Levinson, PA</i>	Real Assets <i>Bill Adams Newton Investment Management</i>
9:35—10:15 am	Capital Markets - Fixed Income <i>Paul Lundmark, CPPT Richmond Capital Management</i>	Using Social Media Responsibly <i>Sean McKinstry, CPPT Susan Marden FPPTA Education Committee</i>	What a Ride It Has Been! What Now For Growth Investing <i>Brian Smith Polen Capital Management</i>
10:15—10:35 am	Morning Refreshment Break—International & Grand Ballrooms Foyer		
10:40—11:20 am	Introduction to Real Estate Investments <i>Matt Warner Manulife Investment Mgt.</i>	The Fixed Income Manager Report <i>Pat Kelly Agincourt Capital Management</i>	Fixed Income in a Low Interest Rate Environment <i>Jeff Detwiler Garcia Hamilton & Assoc.</i>
11:25 am—12:05 pm	Introduction to Ethics <i>Kenneth Harrison, Esq., CPPT Sugarman & Susskind, PA</i>	Investment Consultant Meeting Report <i>Dan Johnson AndCo Consulting</i>	Building and Managing Your Real Estate Portfolio <i>Richelle Cook, CPPT American Realty Advisors</i>
12:05—1:20 pm	Break for Lunch in Tournament Hall—Education Committee Meeting Poinsettia & Quince (Attendance Check-In must be completed by 1:15 pm)		
1:25—2:05 pm	Modern Portfolio Theory & Benchmarking <i>Steve Roth, CPPT Dahab Associates</i>	Real Estate Performance Report <i>Deb Schwartz BARINGS</i>	Establishing a Funding Policy <i>Peter Strong GRS</i>
2:10—2:50 pm	Investment & Economic Cycles <i>Steve Stack Highland Capital Management</i>	Pension Plan Data Center <i>Fred Nesbitt, PhD. FPPTA Education Committee</i>	Why Securities Litigation <i>Marisa DeMato, Esq. Saxena White, PA</i>
2:50—3:10 pm	Afternoon Refreshment Break in International & Grand Ballrooms Foyer		
3:15—3:55 pm	Diversifying Your Equity Portfolio <i>Jason Turner Great Lakes Advisors</i>	Managing Your Service Providers <i>Dwight Mattingly, CPPT FPPTA Education Committee</i>	Becoming an Educator <i>Mike Spencer, CPPT Sean McKinstry, CPPT FPPTA Education Committee</i>
4:00—5:00 pm	Basic Review	Intermediate Review	Advanced Review
	Exams will start promptly at 8 am tomorrow morning. 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.		
4:30—11:00 pm	Hospitality Room and Study Hall in Sabal/Lanai		

CEU 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

<i>Attendance Check-In must be completed by 8:15 am</i>	General Session Grand Ballroom 4 & 5		
8:30—9:30 am	Anatomy of a Recession: The Anti-Taper Tantrum <i>Jeffrey Schulze</i> <i>Clearbridge Investment Management</i>		
	Classroom A Grand Ballroom 3	Classroom B Grand Ballroom 7	Classroom C Grand Ballroom 8
9:35—10:15 am	ESG Investing: Making Green by Going Green <i>Adrian Sancho</i> <i>Inverness Counsel, LLC</i>	Small Cap Stocks—Why Now? <i>Jack McPherson</i> <i>Aristotle Capital Management</i>	Understanding REITS <i>Brian Casey & Even Serton</i> <i>Cohen & Steers</i>
10:15—10:35 am	Morning Refreshment Break—International & Grand Ballrooms Foyer		
10:40—11:20 am	Affordable Housing Crisis <i>Sabrina Unger</i> <i>American Realty Advisors</i>	Understanding Investment Management Fees <i>Alison Berman</i> <i>Palisade Capital Mgt.</i>	Actuarial View on the Discount Rate Assumption <i>Kevin Spanier</i> <i>Buck Consultants</i>
11:25 am —12:05 pm	Qualified Opportunity Zones <i>Joseph Zock</i> <i>Tocqueville Asset Mgt.</i>	Fixed Income in a Rising Interest Rate Environment <i>Ron Ryan & Russ Kamp</i> <i>Ryan ALM</i>	How Timberland & Farmland Can Benefit a Pension Plan <i>Michael Stezelecki & Scott Greenberg</i> <i>Manulife Investment Mgt.</i>
12:05—1:20 pm	Break for Lunch in International Ballroom —Advisory Board Meeting (Attendance Check-In must be completed by 1:15 pm)		
1:25—2:05 pm	Will 5G Be Enough? <i>Kurt Wood</i> <i>DePrince Race Zollo</i>	Inflation Considerations: Preparing Your Portfolio for the Next Risk <i>Nathan Shetty</i> <i>Nuveen</i>	Private Equity Considerations & Outlook <i>Meena Gandhi</i> <i>JP Morgan Asset Management</i>
2:10—2:50 pm	Post Pandemic Road to Value in International Markets <i>Rand Wrighton</i> <i>Barrow Hanley Global Investors</i>	Supply Chain Issues and its Effects on the Maritime Industry <i>George Fikaris</i> <i>EnTrust Global</i>	Recoveries & Remedies: Protecting Your Portfolio Through Securities Litigation <i>Darren Robbins</i> <i>Robbins Geller Rudman & Dowd, LLP</i>
2:50—3:10 pm	Afternoon Refreshment Break in Grand Ballrooms Foyer		
	General Session Grand Ballroom 4 & 5		
3:15—3:55 pm	Trustees Communicating with Local Decision Makers <i>Dan Kleman, FPPTA Education Committee</i> <i>Tom Lussier, The Lussier Group</i>		
4:00—11:00 pm	Hospitality Room and Study Hall in Sabal/Lanai		

CEU 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**

<i>Attendance Check-In must be completed by 8:15 am</i>	Classroom A Grand Ballroom 3	Classroom B Grand Ballroom 7	Classroom C Grand Ballroom 8
8:30—9:30 am	The Perils of Closing a Defined Benefit Plan <i>Brad Heinrichs Foster & Foster</i>	Alternative Investments: Where to Find Opportunities <i>Trey Smith BlackRock</i>	Summary Plan Description Discussion <i>Alan Wolfson Town of Golden Beach Chad Little Freiman Little Actuaries</i>
9:35—10:15 am	Evolution of Emerging Market Economies: Approaches to Accessing Investments <i>Natascha Willans ABS Global Investment Mgt.</i>	Role of Fixed Income in a Low Interest Environment <i>Emily Becker Orleans Capital Management</i>	The Emergence of Secondary Markets as a Mainstream Private Equity Investment <i>Joseph Marks Capital Dynamics</i>
10:15—10:35 am	Morning Refreshment Break—International & Grand Ballrooms Foyer		
10:40—11:20 am	The Cyclicity of Active Management <i>Geoff Gerber Twin Capital Management</i>	Changing Landscape of Commercial Real Estate <i>Paul Nasser Intercontinental Real Estate</i>	Cyber Security & Ransomware Attacks <i>John Reidy Pension Technology Group</i>
11:25 am—12:05 pm	Legal Challenges <i>Ron Cohen, PA Lorium Law</i>	Pension Forfeitures <i>Ken Harrison, CPPT Paul O'Connell</i>	Legal Updates <i>Bonni Jensen Klausner Kaufman Jensen & Levinson</i>
12:05—1:20 pm	Break for Lunch in International Ballroom—Education Committee Meeting (Attendance Check-In must be completed by 1:15 pm)		
	General Session Grand Ballroom 4 & 5		
1:25—2:05 pm	FPPTA Legislative Update <i>Fred Nesbitt, FPPTA Media Consultant Dwight Mattingly, FPPTA Board of Directors Chris Spencer, FPPTA Board of Directors Ron Cohen, Lorium Law</i>		
2:10—2:50 pm	Social Security Update <i>Kurt Czarnowski Czarnowski Consulting</i>		
2:50—3:10 pm	Afternoon Refreshment Break in Grand Ballrooms Foyer		
3:15—3:55 pm	What is Crypto Currency <i>Anthony Napolitano InvestView (INVU)</i>		
4:00—11:00 pm	Hospitality Room and Study Hall in Sabal/Lanai		

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

	Basic Grand 1	Intermediate Grand 2	Advanced Grand 6
8:00— 9:00 am	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.		
	General Session Grand Salon 4 & 5		
9:00— 10:00 am Attendance Check-In must be completed by 8:45 am	Five Lessons Learned in the Face of Adversity <i>Jeffrey Mueller</i> <i>Polen Capital Management</i>		

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 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.

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1-800-842-4064

