

LEARN AND LEAD

Learn from the Past Lead for the Future

The FPPTA is a non-profit, established for the purpose of providing education and information for and about the public pension system, and advocating for defined benefit pension plans.



FPPTA 38th Annual Conference
June 26 – 29, 2022
Hilton Bonnet Creek, Orlando, FL



Schedule of Events



Saturday, June 25th

2:00—5:00 pm
Board of Directors Meeting
Broadway/Carnegie

Sunday, June 26th

Annual Associate Charitable Golf Classic
Lake Buena Vista Golf Course
8:00 am Shotgun Start

12:00—5:00 pm
Exhibitors Move In
Bonnet Creek Ballroom 7—12

3:00—6:30 pm
Event Registration
Bonnet Creek Ballroom Foyer

5:00—7:00 pm
Exhibit Hall and Welcome Gathering
Bonnet Creek Ballroom 7—12
6:00 pm Raffle Drawing

Name Badges

*You and your guest must be registered with the FPPTA. You will not be permitted to enter the General Session or the Exhibit Hall without a name badge.

*All guests must be pre-registered. We are not accepting guest registrations onsite.

Monday, June 27th

Exhibit Hall Schedule Bonnet Creek Ballroom 7—12

7:00—8:00 am	Trustee Networking Continental Breakfast Exhibit Hall
8:00—9:00 am	Exhibit Hall Closed for Opening Ceremonies
9:00—12:45 pm	Board of Directors Election Booth Open
10:15—11:15 am	Trustee Networking Morning Refreshment Break Exhibit Hall
12:45—2:15 pm	Break for Lunch—On Your Own Exhibit Hall Closed
3:45—4:25 pm	Trustee Networking Refreshment Break & Raffle Exhibit Hall

Tuesday, June 28th

Exhibit Hall Schedule Bonnet Creek Ballroom 7—12

7:00—8:00 am	Trustee Networking Continental Breakfast Exhibit Hall
7:00—12:30 pm	Board of Directors Election Booth Open
9:45—10:45 am	Trustee Networking Morning Refreshment Break Exhibit Hall
12:30—2:15 pm	Break for Lunch—On Your Own Exhibit Hall Closed
3:15—4:00 pm	Exhibit Hall Closed Annual Membership Meeting
4:00—5:00 pm	Trustee Networking Refreshment Break & Raffle In General Session Following the Annual Membership Meeting
3:30—7:00 pm	Exhibit Hall Closed Booth Break Down

Monday, June 27, 2022

7:00 am—3:00 pm Conference Registration—Bonnet Creek Ballroom Foyer

7:00 am—8:00 am Continental Breakfast in the Exhibit Hall—Bonnet Creek Ballroom 7—12



<p>Bonnet Creek Ballroom 1—6 8:00—9:00 am</p>	<p>Presentation of Colors Osceola County Sheriff's Office Color Guard</p> <p>Conference Welcome Pete Prior, CPPT, Board of Directors Chairman</p> <p>The State of the FPPTA Kim Prior, CPPT, Chief Executive Officer</p> <p>Board of Directors Election Statements by Candidates</p> <p>Raymond T. Edmondson Service Awards Dwight Mattingly, CPPT Warren West, CPPT</p> <p>Raymond T. Edmondson Scholarship Awards Chloe Chwalik, Charlotte Jensen, Alyvia Villars</p> <p>Presentation of CPPT Awards</p>
<p>9:00—9:10 am</p>	<p>Learn from the Past and Lead for the Future Introduction Fred Nesbitt, PhD, FPPTA Education Committee</p>
<p>9:10—9:30 am</p>	<p>Investing in an Era of Geopolitical Disruption Jerry Navarrete—Newton Investment Management Richard Bullock, Newton Investment Management</p>
<p>9:30—10:15 am</p>	<p>Market Signals: What Financial Markets are Telling Us Now! Professor Peter Ricchiutti, Tulane University</p>
<p>10:15—11:15 am Morning Refreshment Break—Networking in the Exhibit Hall—Bonnet Creek Ballroom 7—12</p>	
<p>11:15—11:45 am</p>	<p>Future Challenges for Public Pension Systems Lamar Taylor Interim Executive Director & Chief Investment Officer, [SBA] State Board of Administration</p>
<p>11:45—12:45 pm</p>	<p>Pension Trustee Issues & Best Practices Moderator: Fred Nesbitt, PhD, FPPTA Education Committee Toby Rabelo, Miami Beach Police Supplemental Plan Phyllis Shaw, Hollywood General Employees Pension Plan Paul O'Connell, Pompano Beach Fire & Police Pension Plan</p>
<p>12:45—2:15 pm Break for Lunch—On Your Own</p>	





Monday, June 27, 2022

7:00 am—3:00 pm Conference Registration—Bonnet Creek Ballroom Foyer

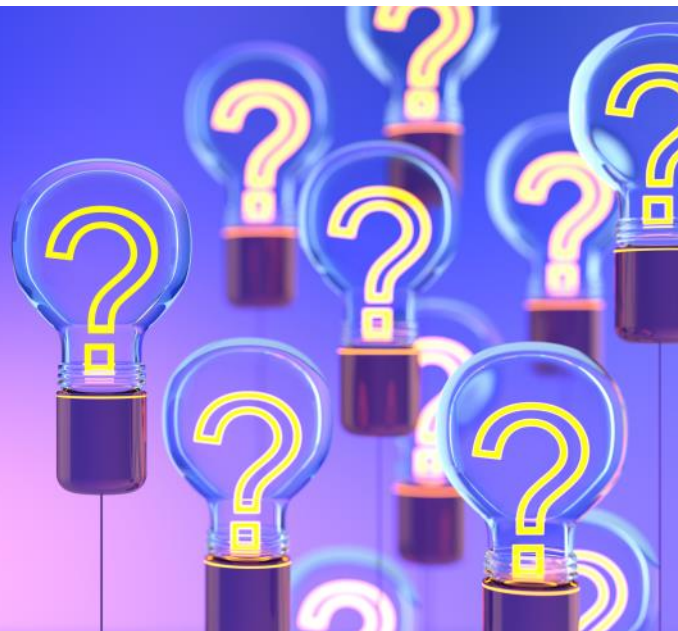
7:00 am—8:00 am Continental Breakfast in the Exhibit Hall—Bonnet Creek Ballroom 7—12

2:15—2:40 pm	Impact of Russia's Invasion of Ukraine on the Global Consumer Jeff Schulze, ClearBridge Investments
2:40—3:00 pm	U. S. Public Pension Peer Risk Study Jonathan Cogan and Sarah Siwinski, BlackRock
3:00—3:45 pm	Risk Management During Turbulent Times Moderator —Peter Hapgood, FPPTA Education Director David Settles, State Street Global Advisors Ron Ryan, Ryan ALM
3:45—4:45 pm	Networking in Exhibit Hall - Bonnet Creek Ballroom 7—12 Refreshment Break and Raffle

Do you have a question for
a speaker or panelist?

Email them at
Questions@fppta.org

They will respond to you
after the conference.



Tuesday, June 28, 2022

7:00 am—3:00 pm Conference Registration—Bonnet Creek Ballroom Foyer

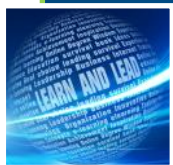
7:00 am—8:00 am Continental Breakfast in the Exhibit Hall—Bonnet Creek Ballroom 7—12



Bonnet Creek Ballroom 1—6	Learn from the Past and Lead for the Future
8:00—8:45 am	Why Fixed Income? Moderator —Debbie McCoy, FPPTA Education Committee Paul Lundmark, Richmond Capital Management Mark Delaney, Garcia Hamilton & Associates
8:45—9:45 am	What Public Pension Plans Need to Know About Investing in Times of Inflation Moderator —Mike Spencer, Education Committee Geoff Gerber, Twin Capital Management Kurt Wood, DePrince, Race, Zollo Peter Epstein, J.P. Morgan Asset Management
9:45—10:45 am	Morning Refreshment Break—Networking in the Exhibit Hall—Bonnet Creek Ballroom 7—12
10:45—11:45 am	Actuarial Issues Confronting Public Pension Plans During Periods of Inflation Moderator —Peter Hapgood, Education Committee Bryan Falato, Aon Joe Griffin, Foster & Foster Brad Armstrong, Gabriel, Roeder, Smith
11:45—12:30 pm	The Next Chapter: Leading Florida Public Pension Plans into the Future Moderator —Ron Insana, Schroders Mike Welker, AndCo Consulting Brad Heinrichs, Foster & Foster
12:30—2:15 pm	Break for Lunch—On Your Own



LEARN FROM THE PAST
LEAD FOR THE FUTURE



Tuesday, June 28, 2022
7:00 am—3:00 pm Conference Registration—Bonnet Creek Ballroom Foyer

2:15—2:30 pm	<p style="text-align: center;">Tools for Today's FPPTA Trustees</p> <p style="text-align: center;">Susan Marden, FPPTA Public Relations Consultant Sean McKinstry, FPPTA Director of Research</p>
2:30—3:15 pm	<p style="text-align: center;">The Future is Now: Staying Ahead of the Curve</p> <p style="text-align: center;">Crystal Washington Futurist, Technology Strategist, Author</p>
3:15—4:00 pm	<p style="text-align: center;">FPPTA Annual Membership Meeting</p> <p style="text-align: center;">Reporting from the Board of Directors, Chief Executive Officer, Accountant, Auditor & Attorney</p>
4:00—5:00 pm	<p style="text-align: center;">Networking in General Session Refreshment Break and Raffle In General Session Following the Membership Meeting</p>



Board of Directors Election results will be posted near registration at 2:00 pm.

2:15 pm Board of Directors Meeting
Seating of Directors in meeting room Broadway/Carnegie



Wednesday, June 29, 2022
8:00 am—9:00 am Continental Breakfast in Bonnet Creek Ballroom 7—12



9:00—10:00 am

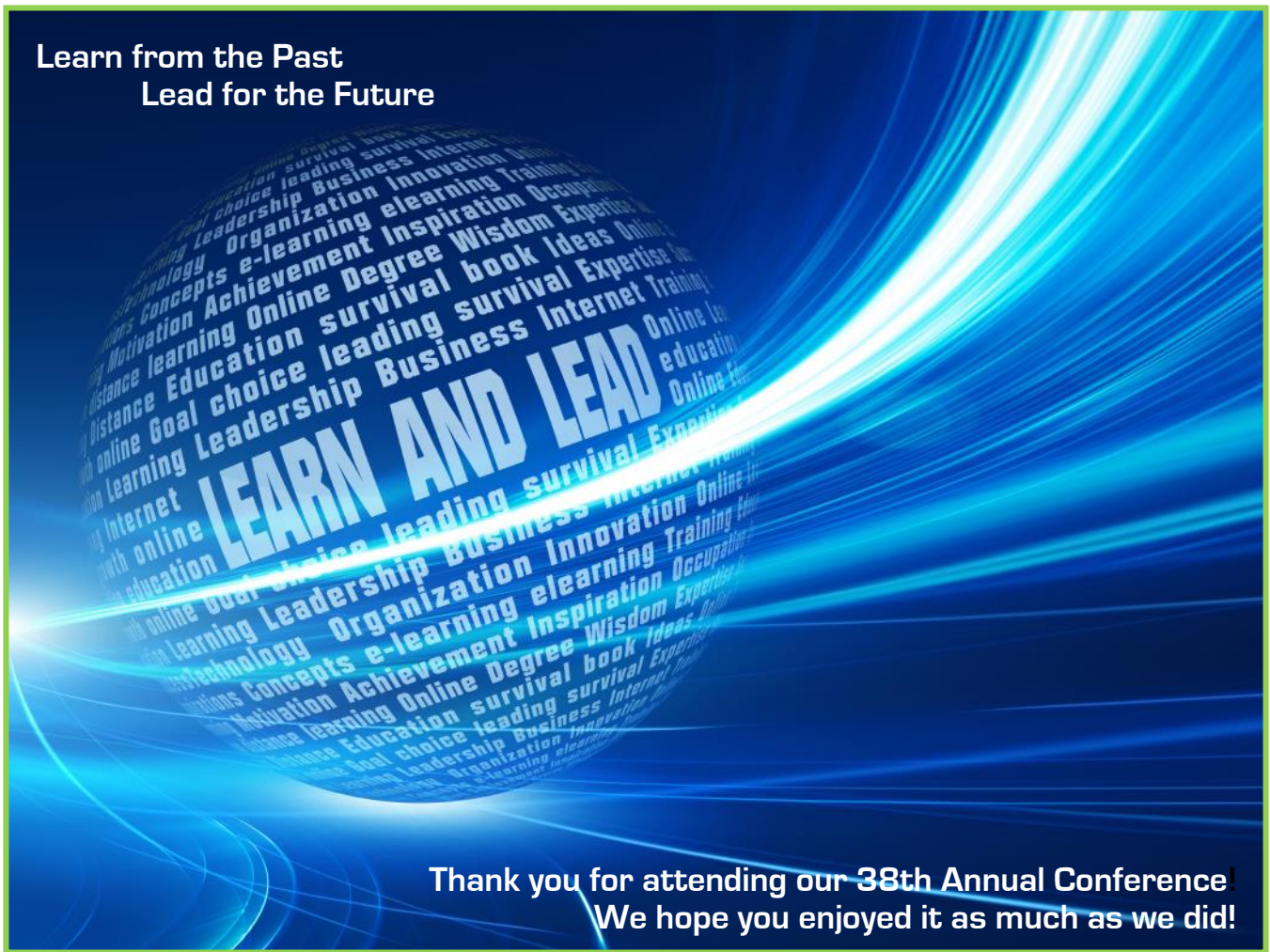
Flip It Thinking

David Keeling

This interactive session will not only provide tips and tricks to enable people to think, feel and do better, both personally and professionally, but will also explore a variety of ways to succeed by "Flip It Thinking"

How to get a Dose of Happiness
Fast and Slow Thinking
The Circle of Control
How to Shift Wonky Language Using the Three N's
Magic Questions
The Four Reactions to Change

Learn from the Past
Lead for the Future



Thank you for attending our 38th Annual Conference!
We hope you enjoyed it as much as we did!



LEARN FROM THE PAST
LEAD FOR THE FUTURE



Raymond T. Edmondson Service Awards



Raymond T. Edmondson Service Award

The Raymond T. Edmondson Service Award was established in 2004 to recognize *the decades of leadership he provided* to the Florida Public Pension Trustees Association, and to annually acknowledge a member of the Association who emulates his tireless commitment to protecting the retirement security of Florida's public employees and their retirement systems.



Dwight Mattingly, CPPT

Dwight Mattingly is a strong champion of public workers' rights. Following a back injury in 1996, Dwight left his teaching job and joined the Palm Beach County Public Transit (Palm Tran) after a friend recommended the job partly because of the pension benefit. Soon after, he became a member of the Amalgamated Transit Union where he rose to Financial Secretary, then President/Business Agent, which entailed serving on the pension board. In 2012 he was named Chairman of the Board of Trustees of the Palm Tran/ATU 1577. Dwight also serves as Vice Chairman of the Florida Amalgamated Transit Union State Legislative Conference Board. As a member of the ATU 1577 Pension Fund, he has spent the last three years actively lobbying in Tallahassee to protect workers' rights and public pensions. He has been asked to testify before several committees and Senate caucuses.

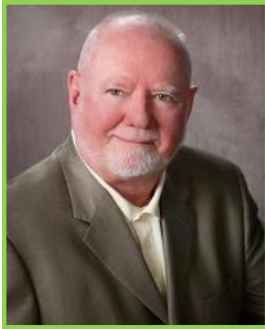
He joined the FPPTA, earned his CPPT designation, and successfully ran for the Board of Directors in 2012. He is a member of the Education Committee and serves on the By-Laws and Audit Committees. His duties as a union representative means he is keyed into many labor related issues. He works tirelessly to keep the FPPTA informed of proposed and pending legislation that will affect public pensions. He brings a wealth of experience to our Board and the FPPTA is proud to have him as a member.



Warren West, CPPT

Warren West is a member of the Avon Park Firefighters Pension Fund. He has served more than 35-years in fire rescue services. Warren joined the U.S. Air Force in 1978 as a Fire Protection Specialist until he moved to Florida in 1983, when he was hired as a Florida State Park Ranger before resuming his career as a firefighter. He has worked as an Avon Park Firefighter since 1986 and has obtained the rank of captain. In 1988 Warren became a founding member of Avon Park Professional Firefighters Local 3132 where he served as Secretary/Treasurer for several years before becoming President. Warren has served as President of Local 3132 for more than twenty years. In 2003 Warren was elected by the participants to serve as a Board member of the Avon Park Firefighters Pension fund. In 2005 he became the board chairman and has held that position to present day. In January 2008, Warren completed the FPPTA's CPPT program and was appointed to the FPPTA Education Committee in June 2011. He was elected to the FPPTA Board of Directors in 2018. Warren serves on the Election, By-Laws and Executive Oversight Committees. Warren has demonstrated his commitment by extending his involvement with our organization year after year and we are grateful not only for his generosity, but his reliability.

Raymond T. Edmondson Scholarship Awards



Raymond T. Edmondson Scholarship Award

The FPPTA is proud to announce the creation of the Raymond T. Edmondson Scholarship Award that was established in 2019 in recognition of the vision and leadership Raymond T. Edmondson provided to the FPPTA as CEO since its inception in 1984 until his retirement in 2014.

The scholarship is open to all active FPPTA members, member's spouses and children seeking financial assistance at a college, university, police academy, fire academy, trade or vocational school.



Chloe Chwalik

Chloe Chwalik, a graduate of Leon High School in Tallahassee, demonstrating her strong commitment to service. She has contributed more than 300 hours of volunteer work for Dance Marathon, a school program to organize fundraising events, and at least 100 hours as a host for fundraising on behalf of the Tallahassee Memorial Cancer Center, raising more than \$50,000 for that charity. She also has organized volunteer opportunities for her high school student government to read to children, and organized contributions for Big Bend Homeless Coalition. Chloe's activities don't end there, throughout high school she has participated in varsity cheerleading, National Honor Society, National English Honor Society, and Rho Kappa National Social Studies Honor Society among other activities. Chloe graduated from Leon High School with distinction, Summa Cum Laude. Chloe is attending Elon University as a sophomore in the fall of 2022 with a GPA of 3.8 where she will continue to major in biology as a path to a career in medicine.



Charlotte Jensen

Charlotte Jensen, of Clearwater, is the daughter of Thomas Jensen, a Clearwater Firefighter. Charlotte has already obtained a degree in Marine Biology. She attended St. Petersburg College, where she earned an Associate's Degree in 2018, and she attended the University of South Florida, earning a Bachelor of Science in 2021. She will be attending the University of Miami, RSMAS, in an accelerated program beginning in the fall of 2022, where she will pursue a degree in Tropical Marine Ecosystems.

Charlotte has volunteered for numerous organizations including the Innsbrook Scholarship Fundraiser, Marine Mammal volunteer and the Florida Aquarium Center for Conservation.



Alyvia Villars

Alyvia Villars, is from Sebastian, and plans to become a nurse practitioner. She graduated from Sebastian River High School and is planning to attend Indian River State College as a freshman in 2022-23. Alyvia has always had a passionate interest in biology and is pursuing a Bachelor of Science in Nursing.

Alyvia filled her high school years with an active schedule. She participated in sports, volunteer work, and a part-time job, as well as earning a spot in a dual enrollment program that allowed her to take three college courses on top of her high school course schedule. She played on the high school's varsity softball team, serving as team captain in her senior year, varsity golf and JV volleyball.

She is the daughter of Richard Villars of Indian Shores PSO and an Indian Shores Firefighter.





CPPT Recipients October 2021 & January 2022

October 2021 Recipients

Felicia A. Scott	Riviera Beach General Employees Pension Fund
Jose Reina	Miami Beach Police Relief & Pension Fund
Lynn Skinner	Salem Trust Company
Lora Guglielmini	Cape Coral General Employees Pension Fund
Tameka A. Stewart	Miami Beach Fire & Police Pension Fund
Ernest Olivas	Oakland Park Police & Fire Pension Fund
David Farquharson	Vero Beach Police Officers Pension Fund
Claire Pierre	Lauderhill Confidential & Managerial Pension Fund
Amy Lovoy	Pensacola General Employees Pension Fund
William Watts	Maitland Police Officers & Firefighters Pension Trust Fund
Dustin Moore	Maitland Police Officers & Firefighters Pension Trust Fund
Christopher McAlpine	Parrish Medical Center Pension Fund
Gregory Glatt	Richmond Capital Management

October 2021 Virtual Recipients

Robert Davis	Ocala Firefighters' Pension Fund
Robert Feierstadt	Aventura Police Officers Pension Fund
Lucy Papadopoulos	Tampa Fire & Police Pension Fund
Joe Meeske	Port Orange Fire Rescue Pension Fund
Christopher Diaz	Lakeland Employees' Pension Fund
Denise Horland	Plantation Police Officers' Pension Fund
Rick Lilyquist	Lakeland Employees' Pension Board
Thomas Positano	Clair T. Singerman Pension Plan

CPPT Recipients

October 2021 & January 2022



January 2022 Recipients

Julio Torres	Town of Surfside General Employees Pension Fund
Shayla Griggs	Sarasota Police Officers' Pension
Michel Tovar	North Miami Police Officers Pension Fund
David W Mountford	Tamarac Police Pension Fund
Brenda Lee	Clair T. Singerman Pension Fund
Kevin L. Warren	North Miami 748 Police Pension Board
Steven T. Schield	Longboat Key Consolidated Pension Fund
Thomas Stadelmaier	Jacksonville General Employees Pension Fund
Raymond Capitola	Mount Dora Firefighters Pension Fund
Demetri Konstantopoulos	City of Sarasota Police Officers Pension Plan
Jason Debrincat	Town of Palm Beach
John Lancaster	Dade County Firefighter Ins Trust
Donald Edman	Riviera Beach General Employees Pension Fund
Todd Jessup	RVX Asset Management
Kyle Davis	Lakeland Firefighters Pension Fund
Thomas Sharp	Palm Harbor Fire Rescue Pension Fund
Jeremy Baker	Palm Tran ATU Pension Fund
Bob Mays	Wilton Manors GE & Police Pension Fund
Christopher Ryan	Pinellas Park Police Officers' Pension Fund
Troy Schaaf	Lantana Police Officers Pension Fund
Jeffrey Rasor	Delray Beach Police Pension Fund

Congratulations to all who earned their Certification!



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Thank you!

Sponsors as of
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Premium Sponsors



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Thank you!



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Exhibitors

As of June 20, 2022

Company	Booth
Sawgrass Asset Management	1
Wolf Popper	2
Great Lakes Advisors	3
Virtus Investment	4
Intercontinental Real Estate	5
Lazard Asset Management	6
Sage Advisory Services	7
Allspring Global Investment	8
Resource Centers, LLC	9
Highland Capital Management	10
Bridgeway Capital Management	11
Dana Investment	12
Newton Investment Management	14
Pomerantz	15
Amalgamated Bank	17
Ullico	23
Buck Consultants	24
FPPTA	26
FPPTA BOD Election	27
Dahab Associates	28
The Howard E. Nyhart Company	30
Salem Trust	31
National Investment Service	32
Burgess Chambers & Associates	33
BlackRock	34
Pension Technology Group	35
AndCo Consulting	36

American Reality Advisors	37
Loomis Sayles & Company	38
Robbins Geller Rudman & Dowd LLP	39
Atlanta Capital Management	46
Nuveen	47
Cohen & Steers	48
Fiduciary Trust Investment of the South	49
Aon	50
DePrince Race & Zollo	51
Schroders	52
Aristotle Capital Management	53
Polen Capital Management	54
Manulife Investment Management	55
Capital Dynamics	56
Gabriel, Roeder, Smith & Co	57
ABS	58
Bernstein Litowitz Berger & Grossman	59
Barrow Hanley Global Investors	60
ClearBridge Investments	61
Segall Bryant & Hill	62
Foster & Foster Consulting Actuaries	63
Scott & Scott	65
Leitbox Storage Partners	66
Income Research & Management	67
Richmond Capital Management	68
Amundi Asset Management US	69
State Street Global Advisors	70
GW&K Investment Management	71
Saxena White	72





Associate Charitable Golf Classic Sponsors

36th Annual Associate Charitable Golf Classic Sponsors

Allspring Global Investment	Golf Hole Package	Hole 5—Longest Drive—Men
AndCo Consultants	Golf Hole Sponsor	Hole 8
Cohen & Steers	Golf Hole Package	Hole 17
DePrince, Race & Zollo	Golf Hole Package	Hole 11—Sponsor of Golf Towels & Hats
Garcia Hamilton & Associates	Golf Hole Package	Hole 7—Closest to the Pin—Women Sponsor of Golf Towels & Hats
Great Lakes Advisors	Golf Hole Sponsor	Hole 16—Closest to the Pin—Men
Highland Capital Management	Golf Hole Package	Hole 10
Investment Performance Services	Golf Hole Sponsor	Hole 18
Lorium Law	Golf Hole Package	Hole 12
National Investment Services	Golf Hole Package	Hole 9
Polen Capital Management	Golf Hole Package	Hole 3
Richmond Capital Management	Golf Hole Sponsor	Hole 4
Sawgrass Asset Management	Golf Hole Sponsor	Hole 14 Longest Drive—Woman
Wellington Management	Golf Hole Package	Hole 6



Associate Charitable Golf Committee

Steve Aspinall, CPPT
Paul Lundmark, CPPT
Katie Byrne, CPPT
Janna Hamilton, CPPT

Sponsors as of
June 10th

2021 - 2022 Board of Directors



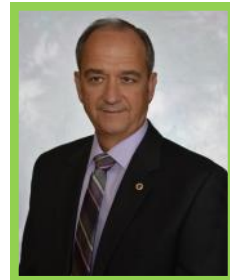
Pete Prior, CPPT
Chairman
Hialeah Gardens Police



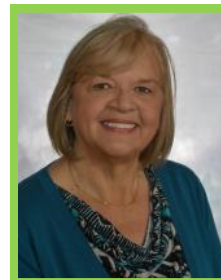
Warren West, CPPT
Avon Park Firefighters



Tim Olsen, CPPT
Vice Chairman
Melbourne Firefighters



Dwight Mattingly, CPPT
Amalgamated Transit 1577



Ann Thompson, CPPT
Secretary
Vero Beach Police



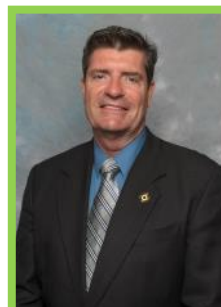
Ken Harrison, CPPT
Director Emeritus



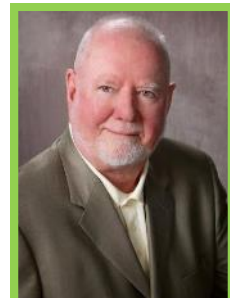
Steve Aspinall, CPPT
Treasurer
St. Petersburg Police



Renee Lipton, CPPT
Director Emeritus



Christopher Spencer, CPPT
*North Collier Fire Control
& Rescue District
Firefighters Retirement
Plan*



Raymond T. Edmondson,
CPPT
Director Emeritus
1937—2017



2022 Education Committee

Board of Directors

Ann Thompson, CPPT
Tim Olsen, CPPT
Steve Aspinall, CPPT
Dwight Mattingly, CPPT
Warren West, CPPT
Chris Spencer, CPPT

FPPTA Associate Members

Mary Byrom
Steve Roth
Dan Johnson
Kate Hurley
Jerry Navarrete

FPPTA Trustee Members

Phyllis Shaw, CPPT
Warren West, CPPT
Lynn Bernstein, CPPT
Debbie McCoy, CPPT
Paul O'Connell, CPPT
Toby Rabelo, CPPT

FPPTA Education Staff and Consultants

Peter Hapgood, CPPT, Chair
Steve Corbet, CPPT, Vice Chair
Mike Spencer, CPPT, Dean of Faculty
Sue Marden, Public Relations
Fred Nesbitt, Media
Kim Prior, CPPT, CEO
MJ Chwalik, COO
Sean McKinstry, CPPT, Director of
Research, Education Committee Secretary

FPPTA Volunteer Representatives

Katie Byrne, CPPT
Brian Falato

Advisory Representatives

Dan Kleman, CPPT
W.O. Bell
Pete Prior, CPPT, Board of Directors Chair.
Ken Harrison, CPPT, Director Emeritus
Anthony Xuereb

THANK YOU

Education Committee Members
for your time and dedication to the
FPPTA!
We appreciate you!!



FPPTA Staff and Consultants



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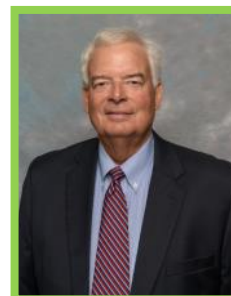


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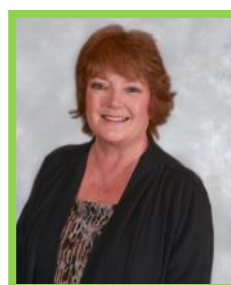
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Fred Nesbitt, PhD
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2022 & 2023 Calendar of Events

Trustees School	October 9 -12, 2022	Renaissance Sea World
Trustees School	January 29—February 1, 2023	Rosen Centre
39th Annual Conference & Expo	June 25—28, 2023	Rosen Shingle Creek
Trustees School	October 1—4, 2023	Sawgrass Marriott



Save the Date
Fall Trustee School
October 9—12, 2022
Renaissance Orlando at Sea World

The next Trustee School will be held at the Renaissance Orlando at Sea World
on October 9—12, 2022.

The FPPTA Education Committee hosted their annual meeting in the spring. They spent two days thoroughly reviewing every presentation in the CPPT program to insure its continued timely and appropriate content, and developed a completely new CEU program.

October will be the 23rd anniversary of the beginning of the Certified Public Pension Trustee (CPPT) Program. Since its first offering, the FPPTA has recorded over 2000 trustees who have entered the most comprehensive public pension trustee certification program in the country.

The motto of the Education Committee is to provide a better program than the last. In 2021 they completely redesigned the CPPT program from your suggestions in the survey evaluations. Thank you for sharing your thoughts and ideas.

