



Florida Public Pension Trustees Association

Fall Trustee School Program Agenda

Renaissance Orlando at Sea World
October 2—5, 2022

Saturday, October 1, 2022

2:00 pm Board of Directors Meeting in Longboat

Sunday, October 2, 2022

3:00—6:00 pm Trustee School Registration in Peninsula Ballroom Foyer

4:15—5:00 pm New Member Orientation in Peninsula 3

5:00—7:00 pm Welcome Gathering in Peninsula 4

Conference Area Wi-Fi Code:



CPPT Program

Monday, October 3, 2022

7:30 am—3:00 pm Registration Open * 7:30 am—8:30 am Continental Breakfast
Peninsula Ballroom Foyer

<i>Attendance Check-In must be completed by 8:15 am</i>	Basic Peninsula 3	Intermediate Peninsula 2	Advanced Peninsula 1
8:30—9:00 am	The Administrator <i>Scott Baur</i> <i>Resource Centers</i>	FPPTA Pension Plan Data Center <i>Fred Nesbitt, PhD.</i> <i>FPPTA Education Committee</i>	Modification of Pension Plans <i>Mark Floyd, Esq.</i> <i>Mierzwa & Floyd, PA</i>
9:05—9:35 am	Board Meeting Basics <i>Steve Corbet, CPPT</i> <i>FPPTA Education Committee</i>	Investment Consultant Report <i>Greg White</i> <i>Investment Performance Services, LLC</i>	Fixed Income in a Rising Rate Environment <i>Jeff Detwiler</i> <i>Garcia Hamilton & Assoc.</i>
9:40—10:10 am	The Actuary <i>Eric Atwater</i> <i>Aon</i>	Equity Managers Meeting Report <i>Lisa George</i> <i>Nuveen</i>	Emerging Markets <i>Kurt Wood</i> <i>DePrince Race Zollo</i>
10:10—10:30 am	Morning Refreshment Break—Peninsula Ballroom Foyer		
10:30 am —11:00 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 Actuaries</i>	Building & Managing Your Real Estate Portfolio <i>Richelle Cook</i> <i>American Realty Advisors</i>
11:05—11:34 am	The Custodian <i>Mark Rhein</i> <i>Salem Trust Company</i>	Investment Consultant/ Asset Allocations <i>Mitchell Brennan</i> <i>Burgess Chambers & Assoc.</i>	Asset Allocation <i>Aaron Lally</i> <i>Meketa Investment Group</i>
11:40—12:10 pm	The Investment Consultant <i>Kerry Richardville</i> <i>AndCo Consulting</i>	Introduction to Alternative Investments <i>Jordan Jackson</i> <i>JP Morgan Asset Mgt.</i>	Impact of Changing Actuarial Assumptions <i>Chad Little</i> <i>Freiman Little Actuaries</i>
12:10—1:30 pm	Break for Lunch in Peninsula 4—Education Committee Meeting Longboat (Attendance Check-In must be completed by 1:15 pm)		
1:30—2:00 pm	The Attorney <i>Ricki Levy, Esq. CPPT</i> <i>Lorium Law</i>	Understanding Non-Traditional Assets <i>Beth Bowen</i> <i>Asset Consulting Group</i>	Private/Real Assets <i>Jim Lydotes</i> <i>Newton</i>
2:05—3:10 pm (65 Minute Session)	Introduction to Ethics <i>Kenneth Harrison</i> <i>Sugarman & Susskind</i>	Chapter 112—175—185 <i>Adam Levinson</i> <i>Klausner Kaufman Jensen & Levinson</i>	Communicating with Local Decision Makers <i>Dan Kleman</i> <i>Port St. Lucie Police Pension Plan</i>
3:10—3:30 pm	Afternoon Refreshment Break in Peninsula Ballroom Foyer		
3:30—4:30 pm	BASIC REVIEW Debbie McCoy, CPPT Paul O'Connell, 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 Merritt		

CPPT Program
Tuesday, October 4, 2022

7:30 am—3:00 pm Registration Open * 7:30 am—8:30 am Continental Breakfast
Peninsula Ballroom Foyer



<i>Attendance Check-In must be completed by 8:15 am</i>	General Session for All Levels Peninsula 5, 6, 7		
8:30—9:00 am	Social Security Update <i>Kurt Czarnowski</i> <i>Czarnowski Consulting</i>		
9:05—10:10 am	Real Deal Research <i>A Look at Retirement Income Adequacy</i> <i>Bryan Falato, Aon</i> <i>Tyler Bond, National Institute on Retirement Security</i>		
10:10—10:30 am	Morning Refreshment Break—Peninsula Ballroom Foyer		
	Basic Peninsula 3	Intermediate Peninsula 2	Advanced Peninsula 1
10:30—11:00 am	Capital Markets—Equity <i>Geoff Gerber</i> <i>Twin Capital Management</i>	Disability Process <i>Pedro Herrera</i> <i>Sugarman & Susskind, PA.</i> (65 Minute Session)	Review of Risk & Volatility <i>Steve Roth</i> <i>Dahab Associates</i>
11:05—11:35 am	Capital Markets - Fixed Income <i>Paul Lundmark, CPPT</i> <i>Richmond Capital Management</i>		Private Equity <i>Rob Hatch</i> <i>Constitution Capital Partners</i>
11:40—12:10 am	Modern Portfolio Theory & Benchmarking <i>Steve Roth, CPPT</i> <i>Dahab Associates</i>	Fixed Income Manager Report <i>Pat Kelly</i> <i>Agincourt Capital Management</i>	Style Cycles <i>Russ Kamp</i> <i>Ryan ALM</i>
12:10—1:30 pm	Break for Lunch in Peninsula 4—Education Committee Meeting Longboat (Attendance Check-In must be completed by 1:15 pm)		
1:30—2:00 pm	Introduction to Real Estate <i>Kevin Ryan</i> <i>Manulife Investment Mgt.</i>	Real Estate Performance Report <i>Deb Schwartz</i> <i>Barrings</i>	Why Securities Litigation <i>Maya Saxena</i> <i>Saxena White</i>
2:05—2:35 pm	Investment & Economic Cycles <i>Steve Stack</i> <i>Highland Capital Management</i>	Managing Your Service Provider <i>Dwight Mattingly, CPPT</i> <i>FPPTA Education Committee</i>	Establishing a Funding Policy <i>Pete Strong</i> <i>Gabriel Roeder & Smith</i>
2:40—3:10 pm	Diversifying Your Equity Portfolio <i>Jason Turner</i> <i>Great Lakes Advisors</i>	Investment Consultant / Manager Search <i>Scott Owens</i> <i>Graystone Consulting</i>	Maximizing Your FPPTA Resources <i>Sean McKinstry, CPPT</i> <i>FPPTA Education Committee</i>
3:10—3:30 pm	Afternoon Refreshment Break in Peninsula Ballroom Foyer		
3:30—4:30 pm	Basic Review	Intermediate Review	Advanced Review
4:30—11:00 pm	Hospitality Room and Study Hall in Merritt		