



# Florida Public Pension Trustees Association

## Winter Trustee School Program Agenda

Rosen Centre, Orlando  
January 29—February 1, 2023

### **Saturday, January 28, 2023**

2:00 pm Board of Directors Meeting

### **Sunday, January 29, 2023**

3:00—6:00 pm Trustee School Registration

4:15—5:00 pm New Member Orientation

5:00—7:00 pm Welcome Gathering

**Conference Area Wi-Fi Code:**



**CPPT Program**  
**Monday, January 30, 2023**

**7:30 am—3:00 pm Registration Open \* 7:30 am—8:30 am Continental Breakfast**

|                                                         |                                                                                                    |                                                                                                                    |                                                                                                                        |
|---------------------------------------------------------|----------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------|
| <i>Attendance Check-In must be completed by 8:15 am</i> | <b>Basic</b>                                                                                       | <b>Intermediate</b>                                                                                                | <b>Advanced</b>                                                                                                        |
| 8:30—9:00 am                                            | <b>The Administrator</b><br><i>Scott Baur</i><br><i>Resource Centers</i>                           | <b>FPPTA Pension Plan Data Center</b><br><i>Fred Nesbitt, PhD.</i><br><i>FPPTA Education Committee</i>             | <b>Modification of Pension Plans</b><br><i>Mark Floyd, Esq.</i><br><i>Mierzwa &amp; Floyd, PA</i>                      |
| 9:05—9:35 am                                            | <b>Board Meeting Basics</b><br><i>Steve Corbet, CPPT</i><br><i>FPPTA Education Committee</i>       | <b>Investment Consultant Report</b><br><i>Greg White</i><br><i>Investment Performance Services, LLC</i>            | <b>Fixed Income in a Rising Rate Environment</b><br><i>Jeff Detwiler</i><br><i>Garcia Hamilton &amp; Assoc.</i>        |
| 9:40—10:10 am                                           | <b>The Actuary</b><br><i>Eric Atwater</i><br><i>Aon</i>                                            | <b>Equity Managers Meeting Report</b><br><i>Greg Gosch</i><br><i>Nuveen</i>                                        | <b>Emerging Markets</b><br><i>Kurt Wood</i><br><i>DePrince Race Zollo</i>                                              |
| 10:10—10:30 am                                          | <b>Morning Refreshment Break</b>                                                                   |                                                                                                                    |                                                                                                                        |
| 10:30 am —11:00 pm                                      | <b>The Role of an Investment Manager</b><br><i>Mary Byrom</i><br><i>Atlanta Capital Management</i> | <b>The Actuarial Report</b><br><i>Joe Griffin</i><br><i>Foster &amp; Foster Consulting Actuaries</i>               | <b>Building &amp; Managing Your Real Estate Portfolio</b><br><i>Jay Butterfield</i><br><i>American Realty Advisors</i> |
| 11:05—11:35 am                                          | <b>The Custodian</b><br><i>Mark Rhein</i><br><i>Salem Trust Company</i>                            | <b>Investment Consultant/ Asset Allocations</b><br><i>Mitchell Brennan</i><br><i>Burgess Chambers &amp; Assoc.</i> | <b>Asset Allocation</b><br><i>Aaron Lally</i><br><i>Meketa Investment Group</i>                                        |
| 11:40—12:10 pm                                          | <b>The Investment Consultant</b><br><i>Kerry Richardville</i><br><i>AndCo Consulting</i>           | <b>Introduction to Alternative Investments</b><br><i>Jordan Jackson</i><br><i>JP Morgan Asset Mgt.</i>             | <b>Impact of Changing Actuarial Assumptions</b><br><i>Chad Little</i><br><i>Freiman Little Actuaries</i>               |
| 12:10—1:30 pm                                           | <b>Break for Lunch</b><br>(Attendance Check-In must be completed by 1:15 pm)                       |                                                                                                                    |                                                                                                                        |
| 1:30—2:00 pm                                            | <b>The Attorney</b><br><i>Ricki Levy, Esq. CPPT</i><br><i>Lorium Law</i>                           | <b>Understanding Non-Traditional Assets</b><br><i>Beth Bowen</i><br><i>Asset Consulting Group</i>                  | <b>Private/Real Assets</b><br><i>Jim Lydotes</i><br><i>Newton</i>                                                      |
| 2:05—3:10 pm<br>(65 Minute Session)                     | <b>Introduction to Ethics</b><br><i>Kenneth Harrison</i><br><i>Sugarman &amp; Susskind</i>         | <b>Chapter 112—175—185</b><br><i>Adam Levinson</i><br><i>Klausner Kaufman Jensen &amp; Levinson</i>                | <b>Trustee Ethics</b><br><i>Gray Schafer</i><br><i>Florida Ethics Commission</i>                                       |
| 3:10—3:30 pm                                            | <b>Afternoon Refreshment Break</b>                                                                 |                                                                                                                    |                                                                                                                        |
| 3:30—4:30 pm                                            | <b>BASIC REVIEW</b><br>Debbie McCoy, CPPT<br>Paul O'Connell, CPPT<br>Steve Aspinall, CPPT          | <b>INTERMEDIATE REVIEW</b><br>Lynn Bernstein, CPPT<br>Warren West, CPPT<br>Katie Byrne, CPPT                       | <b>ADVANCED REVIEW</b><br>Steve Roth, CPPT<br>Phyllis Shaw, CPPT<br>Chris Spencer, CPPT                                |
| 4:30—11:00 pm                                           | <b>Hospitality Room and Study Hall</b>                                                             |                                                                                                                    |                                                                                                                        |

**CPPT Program**  
**Tuesday, January 31, 2023**

**7:30 am—3:00 pm Registration Open \* 7:30 am—8:30 am Continental Breakfast**



| <i>Attendance Check-In must be completed by 8:15 am</i> | <b>Basic</b>                                                                                                                                                                                                                                                                                                                     | <b>Intermediate</b>                                                                                        | <b>Advanced</b>                                                                                     |
|---------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
| 8:30—9:00 am                                            | <b>Capital Markets—Equity</b><br><i>Geoff Gerber<br/>Twin Capital Management</i>                                                                                                                                                                                                                                                 | <b>Disability Process</b><br><i>Pedro Herrera<br/>Sugarman &amp; Susskind, PA.<br/>(65 Minute Session)</i> | <b>Review of Risk &amp; Volatility</b><br><i>Steve Roth<br/>Dahab Associates</i>                    |
| 9:05—9:35 am                                            | <b>Capital Markets - Fixed Income</b><br><i>Paul Lundmark, CPPT<br/>Richmond Capital Management</i>                                                                                                                                                                                                                              |                                                                                                            | <b>Private Equity</b><br><i>Rob Hatch<br/>Constitution Capital Partners</i>                         |
| 9:40—10:10 am                                           | <b>Modern Portfolio Theory &amp; Benchmarking</b><br><i>Steve Roth, CPPT<br/>Dahab Associates</i>                                                                                                                                                                                                                                | <b>Fixed Income Manager Report</b><br><i>Ryon Acey<br/>Agincourt Capital Management</i>                    | <b>Style Cycles</b><br><i>Russ Kamp<br/>Ryan ALM</i>                                                |
| 10:10—10:30 am                                          | <b>Morning Refreshment Break</b>                                                                                                                                                                                                                                                                                                 |                                                                                                            |                                                                                                     |
| 10:30—11:00 am                                          | <b>Introduction to Real Estate</b><br><i>Kevin Ryan<br/>Manulife Investment Mgt.</i>                                                                                                                                                                                                                                             | <b>Real Estate Performance Report</b><br><i>Deb Schwartz<br/>Barrings</i>                                  | <b>Why Securities Litigation</b><br><i>Maya Saxena<br/>Saxena White</i>                             |
| 11:05—11:35 am                                          | <b>Investment &amp; Economic Cycles</b><br><i>Steve Stack<br/>Highland Capital Management</i>                                                                                                                                                                                                                                    | <b>Managing Your Service Provider</b><br><i>Dwight Mattingly, CPPT<br/>FPPTA Education Committee</i>       | <b>Establishing a Funding Policy</b><br><i>Pete Strong<br/>Gabriel Roeder &amp; Smith</i>           |
| 11:40—12:10 pm                                          | <b>Diversifying Your Equity Portfolio</b><br><i>Jason Turner<br/>Great Lakes Advisors</i>                                                                                                                                                                                                                                        | <b>Investment Consultant / Manager Search</b><br><i>Scott Owens<br/>Graystone Consulting</i>               | <b>Maximizing Your FPPTA Resources</b><br><i>Sean McKinstry, CPPT<br/>FPPTA Education Committee</i> |
| 12:10—1:30 pm                                           | <b>Break for Lunch —Education Committee Meeting (Attendance Check-In must be completed by 1:15 pm)</b>                                                                                                                                                                                                                           |                                                                                                            |                                                                                                     |
|                                                         | <b>General Session</b>                                                                                                                                                                                                                                                                                                           |                                                                                                            |                                                                                                     |
| 1:30—3:00 pm                                            | <b>Hear the Inaudible and See the Invisible</b><br><b>Linda Clemons</b><br><i>Corporate Trainer &amp; Body Language Expert<br/>CEO of Sisterpreneur, Inc.</i><br><b>Communicating with Local Decision Makers</b><br><i>Dan Kleman<br/>Port St. Lucie Police Pension Fund<br/>Fred Nesbitt, PhD<br/>FPPTA Education Committee</i> |                                                                                                            |                                                                                                     |
| 3:10—3:30 pm                                            | <b>Afternoon Refreshment Break</b>                                                                                                                                                                                                                                                                                               |                                                                                                            |                                                                                                     |
| 3:30—4:30 pm                                            | <b>Basic Review</b>                                                                                                                                                                                                                                                                                                              | <b>Intermediate Review</b>                                                                                 | <b>Advanced Review</b>                                                                              |
| 4:00—11:00 pm                                           | <b>Hospitality Room and Study Hall</b>                                                                                                                                                                                                                                                                                           |                                                                                                            |                                                                                                     |



## Continuing Education Program

Monday, January 30, 2023

7:30 am—3:00 pm Registration Open \* 7:30 am—8:30 am Continental Breakfast

|                                                  |                                                                                                                              |                                                                                                                                                                 |                                                                                                                  |
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| Attendance Check-In must be completed by 8:15 am | <b>General Session</b>                                                                                                       |                                                                                                                                                                 |                                                                                                                  |
| 8:30—9:00 am                                     | <b>Is U.S. Economy Heading Towards Recession</b><br><i>Jeffrey Schulze</i><br><i>ClearBridge Investments</i>                 |                                                                                                                                                                 |                                                                                                                  |
| 9:05—9:35 am                                     | <b>Global Supply Chain Issues</b><br><i>Gustavo Bikkesbakker</i><br><i>Paul Louden</i><br><i>Walter Scott &amp; Partners</i> |                                                                                                                                                                 |                                                                                                                  |
| 9:40—10:10 am                                    | <b>The Cyclicalilty of Active Management</b><br><i>Geoff Gerber</i><br><i>Twin Capital Management</i>                        |                                                                                                                                                                 |                                                                                                                  |
| 10:10—10:30 am                                   | <b>Morning Refreshment Break</b>                                                                                             |                                                                                                                                                                 |                                                                                                                  |
|                                                  | <b>Classroom A</b>                                                                                                           | <b>Classroom B</b>                                                                                                                                              | <b>Classroom C</b>                                                                                               |
| 10:30 am —11:00 pm                               | <b>Public Pension Industry Investment Trends</b><br><i>Dan Johnson</i><br><i>AndCo Consulting</i>                            | <b>How Timberland and Farmland Can Benefit a Pension Plan</b><br><i>Scott Greenberg</i><br><i>Julie Koeninger</i><br><i>Manulife Investment Manager</i>         | <b>Inflation's Impact: How to Navigate Your Portfolio</b><br><i>Kim Tilley</i><br><i>Lazard Asset Management</i> |
| 11:05—11:35 am                                   | <b>Publicly Listed Infrastructure</b><br><i>Jim Lydotes</i><br><i>Newton</i>                                                 | <b>The Role of Shareholder Litigation in Driving Corporate Governance Reforms</b><br><i>Hannah Ross</i><br><i>Bernstein Litowitz Berger &amp; Grossman, LLP</i> | <b>Better Understanding of Private Credit</b><br><i>Dan Clare</i><br><i>Constitution Capital Partners</i>        |
| 11:40—12:10 pm                                   | <b>Impact of the Asset Allocation Rollercoaster</b><br><i>Russ Kamp</i><br><i>Ryan ALM</i>                                   | <b>Real Estate in Changing Economic Regimes</b><br><i>Andrew Brett</i><br><i>Intercontinental Real Estate</i>                                                   | <b>Private Asset Classes—Case Studies</b><br><i>Nick Thompson</i><br><i>Schroders</i>                            |
| 12:10—1:30 pm                                    | <b>Break for Lunch (Attendance Check-In must be completed by 1:15 pm)</b>                                                    |                                                                                                                                                                 |                                                                                                                  |

**Conference Area Wi-Fi Code:**

**Continuing Education Program  
Monday, January 30, 2023**



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|                                          | <b>CEU Continued</b>                                                                                                                                                                                                                                                                                                                                                                   |                                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                     |
|                                          | <b>Classroom A</b>                                                                                                                                                                                                                                                                                                                                                                     | <b>Classroom B</b>                                                                                                                                                                                                                                                                                                                                                                      | <b>Classroom C</b>                                                                                                                                                                  |
| 1:30—2:35 pm<br><br>(65 Minute Sessions) | <b>What's Happening Now with These Asset Classes</b><br>Moderator—<br><i>Dave West, AndCo Consulting</i><br><br><b>Domestic Equities</b><br><i>Andrew O'Sullivan, Highland Capital Management</i><br><br><b>Fixed Income</b><br><i>Jeff Detwiler</i><br><i>Garcia Hamilton &amp; Associates</i><br><br><b>Real Estate</b><br><i>Paul Nasser</i><br><i>Intercontinental Real Estate</i> | <b>New Investment Ideas in the Public Pension Funds</b><br>Moderator—<br><i>Tyler Grumbles</i><br><i>AndCo Consulting</i><br><br><b>What is Direct Lending</b><br><i>Peter Kenny, Golub Capital</i><br><br><b>Derivative Investing</b><br><i>Kevin Condry, Dahab Associates</i><br><br><b>Underwriting Income Producing Properties</b><br><i>Bill Leitner, Leitbox Storage Partners</i> | <b>Individual Retirement Asset Allocation</b><br><i>Frank Wan</i><br><i>Burgess Chambers &amp; Associates</i>                                                                       |
| 2:40—3:10 pm                             | <b>The Case for and Against Shareholders Litigation ESG Issues</b><br><i>Adam Savett</i><br><i>Wolf Popper, LLP</i>                                                                                                                                                                                                                                                                    | <b>Revisiting Hedge Fund Investments</b><br><i>Chris Greco</i><br><i>Waycross Partners</i>                                                                                                                                                                                                                                                                                              | <b>Investing in Private Credit</b><br><i>Trey Smith</i><br><i>BlackRock</i>                                                                                                         |
| 3:10—3:30 pm                             | <b>Afternoon Refreshment Break</b>                                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                     |
|                                          | <b>General Session</b>                                                                                                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                                                                                                                                         | <b>Classroom C</b>                                                                                                                                                                  |
| 3:30—4:30 pm                             | <b>FPPTA Legal Panel</b><br><i>Ken Harrison—Moderator</i><br><i>Sugarman &amp; Susskind</i><br><br><i>Adam Levinson</i><br><i>Klausner Kauffman Jensen Levinson</i><br><br><i>Ron Cohen</i><br><i>Lorium Law</i><br><br><i>Mark Floyd</i><br><i>Mierzwa &amp; Floyd</i>                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                         | <b>FPPTA Associate Members Meeting</b><br><br><i>Kim Prior, FPPTA CEO</i><br><i>Peter Hapgood, FPPTA Director of Education</i><br><i>Sean McKinstry, FPPTA Director of Research</i> |
| 4:30—11:00 pm                            | <b>Hospitality Room and Study Hall</b>                                                                                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                     |



## Continuing Education Program

Tuesday, January 31, 2023

7:30 am—3:00 pm Registration Open \* 7:30 am—8:30 am Continental Breakfast

|                                                        |                                                                                                                                                                                                                 |                                                                                                                     |                                                                                                                                     |
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| Attendance Check-In<br>must be completed by<br>8:15 am | <b>General Session</b>                                                                                                                                                                                          |                                                                                                                     |                                                                                                                                     |
| 8:30—9:00 am                                           | <b>Social Security Update</b><br><i>Kurt Czarnowski</i><br><i>Czarnowski Consulting</i>                                                                                                                         |                                                                                                                     |                                                                                                                                     |
| 9:05—10:10 am<br><br>(65 Minute Session)               | <b>Real Deal Research</b><br><b>A Look at Retirement Income Adequacy</b><br><i>Eric Atwater &amp; Emily Swickard</i><br><i>Aon</i><br><br><i>Tyler Bond</i><br><i>National Institute on Retirement Security</i> |                                                                                                                     |                                                                                                                                     |
| 10:10—10:30 am                                         | <b>Morning Refreshment Break</b>                                                                                                                                                                                |                                                                                                                     |                                                                                                                                     |
|                                                        | <b>Classroom A</b>                                                                                                                                                                                              | <b>Classroom B</b>                                                                                                  | <b>Classroom C</b>                                                                                                                  |
| 10:30 am —11:00 pm                                     | <b>FPPTA Pension Plan Data Center</b><br><i>Fred Nesbitt</i><br><i>FPPTA Media Consultant</i>                                                                                                                   | <b>Secular Themes in the Equity Market</b><br><i>Thomas Hynes, Jr.</i><br><i>Aristotle Investment Management</i>    | <b>Setting Actuarial Assumptions &amp; Trends</b><br><i>Sara Carlson &amp; Amanda Brown</i><br><i>Foster &amp; Foster Actuaries</i> |
| 11:05—11:35 am                                         | <b>Contribution Stabilization Policies—Case Study</b><br><i>Brad Armstrong &amp; Pete Strong</i><br><i>Gabriel Roeder Smith &amp; Company</i>                                                                   | <b>China &amp; Taiwan—Dealing with Heightened Risks</b><br><i>Paul Loudon</i><br><i>Walter Scott &amp; Partners</i> | <b>Small Cap Equities Next Generation</b><br><i>Rayna Lesser Hannaway</i><br><i>Polen Capital Management</i>                        |
| 11:40—12:10 pm                                         | <b>Fixed Income in a Rising Rate Environment</b><br><i>John Rochford</i><br><i>Tocqueville Asset Management</i>                                                                                                 | <b>Evolution Emerging Markets</b><br><i>Natascha Willians</i><br><i>ABS Global Investors</i>                        | <b>Role of a Trustee Regarding Actuarial Experience Studies</b><br><i>Kevin Spanier</i><br><i>Buck</i>                              |
| 12:10—1:30 pm                                          | <b>Break for Lunch</b><br><b>(Attendance Check-In must be completed by 1:15 pm)</b>                                                                                                                             |                                                                                                                     |                                                                                                                                     |

**Continuing Education Program**  
**Tuesday, January 31, 2023**



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|               | <b>CEU Continued</b>                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                       |                                                                          |
|               | <b>General Session</b>                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                       |                                                                          |
| 1:30—3:00 pm  | <p><b>Hear the Inaudible and See the Invisible</b><br/> <b>Linda Clemons</b><br/> <i>Corporate Trainer &amp; Body Language Expert</i><br/> <i>CEO of Sisterpreneur, Inc.</i></p> <p><b>Communicating with Local Decision Makers</b><br/> <i>Dan Kleman</i><br/> <i>Port St. Lucie Police Pension Fund</i></p> <p><i>Fred Nesbitt, PhD</i><br/> <i>FPPTA Education Committee</i></p> |                                                                                                                       |                                                                          |
| 3:10—3:20 pm  | <b>Afternoon Refreshment Break</b>                                                                                                                                                                                                                                                                                                                                                  |                                                                                                                       |                                                                          |
|               | <b>Classroom A</b>                                                                                                                                                                                                                                                                                                                                                                  | <b>Classroom B</b>                                                                                                    | <b>Classroom C</b>                                                       |
| 3:20—4:00 pm  | <p><b>Introduction to Crypto Currency</b><br/> <i>Jordan Rosenberg</i><br/> <i>Galaxy Fund Management</i></p>                                                                                                                                                                                                                                                                       | <p><b>Transition Management</b><br/> <i>Robert Saffer—Trustee</i><br/> <i>Boca General Employees Pension Fund</i></p> | <p><b>Private Equity</b><br/> <i>Joseph Marks – Capital Dynamics</i></p> |
| 4:00—11:00 pm | <b>Hospitality Room and Study Hall</b>                                                                                                                                                                                                                                                                                                                                              |                                                                                                                       |                                                                          |



Winter Trustees School  
Wednesday, February 1, 2023  
7:00 am—9:00 am Continental Breakfast



|                                                                               | Basic<br>Peninsula 3                                                                                                                                                                                                                                             | Intermediate<br>Peninsula 2 | Advanced<br>Peninsula 1 |
|-------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|-------------------------|
| 8:00—<br>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                                                                                                                                                                                                                                                  |                             |                         |
| 9:00—<br>10:00 am<br><br>Attendance Check<br>-In must be completed by 8:45 am | Leadership Starts with the Individual<br>Shayla Rivera<br>Aerospace Engineer & Rocket Scientist with NASA                                                                                                                                                        |                             |                         |

## 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.