

39<sup>th</sup> Annual Conference & Expo  
Florida Public Pension Trustees Association

# The Public Pension Community: United for Tomorrow



Research Global Picture  
Resources Fiduciary  
Community Demographics  
Cybercrime



Rosen Shingle Creek  
Orlando, Florida  
June 25 – 28, 2023

© FPPTA

# Schedule of Events

<b>Saturday, June 24th</b>
<b>2:00—5:00 pm</b> <b>Board of Directors Meeting</b> <b>Suwannee 13—14</b>
<b>Sunday, June 25th</b>
<b>Annual Associate Charitable Golf Classic</b> <b>Rosen Shingle Creek Golf Course</b> <b>8:00 am Shotgun Start</b>
<b>12:00—5:00 pm</b> <b>Exhibitors Move In</b> <b>Panzacola Ballroom 1—2</b>
<b>3:00—6:00 pm</b> <b>Event Registration</b> <b>Panzacola Ballroom Foyer</b>
<b>5:00—7:00 pm</b> <b>Exhibit Hall and Welcome Gathering</b> <b>Panzacola Ballroom 1—2</b> <b>6:00 pm Raffle Drawing</b>

## 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 on-site.

<b>Monday, June 26th</b>	<b>Exhibit Hall Schedule Panzacola Ballroom 1—2</b>
<b>7:00—8:00 am</b>	<b>Trustee Networking Continental Breakfast Exhibit Hall</b>
<b>8:00—9:15 am</b>	<b>Exhibit Hall Closed for Opening Ceremonies</b>
<b>9:15—12:45 pm</b> <b>2:15—5:45 pm</b>	<b>Board of Directors Election Booth Open</b>
<b>10:30—11:30 am</b>	<b>Trustee Networking Morning Refreshment Break Exhibit Hall</b>
<b>12:45—2:15 pm</b>	<b>Break for Lunch—On Your Own Exhibit Hall Closed</b>
<b>4:15—5:30 pm</b>	<b>Trustee Networking Refreshment Break &amp; Raffle Exhibit Hall</b>
<b>Tuesday, June 27th</b>	<b>Exhibit Hall Schedule Panzacola Ballroom 1—2</b>
<b>7:00—8:00 am</b>	<b>Trustee Networking Continental Breakfast Exhibit Hall</b>
<b>7:00—12:30 pm</b>	<b>Board of Directors Election Booth Open</b>
<b>10:00—11:00 am</b>	<b>Trustee Networking Morning Refreshment Break Exhibit Hall</b>
<b>12:45—2:15 pm</b>	<b>Break for Lunch—On Your Own Exhibit Hall Closed</b>
<b>12:45—2:15 pm</b>	<b>Board of Directors Meeting Suwannee 13—14</b>
<b>3:30—4:15 pm</b>	<b>Exhibit Hall Closed Annual Membership Meeting</b>
<b>4:15—5:30 pm</b>	<b>Trustee Networking Refreshment Break &amp; Raffle Exhibit Hall</b>
<b>5:00—7:00 pm</b>	<b>Exhibit Hall Closed Booth Break Down</b>

## Monday, June 26, 2023

7:00 am—3:00 pm Conference Registration—Panzacola Ballroom Foyer

7:00 am—8:00 am Continental Breakfast in the Exhibit Hall—Panzacola Ballroom 1—2

<b>Panzacola Ball-room</b> 8:00—9:15 am	<p><b>Presentation of Colors</b> <i>Osceola County Sherriff's Office Color Guard</i></p> <p><b>Conference Welcome</b> <i>Pete Prior, CPPT, Board of Directors Chairman</i></p> <p><b>The State of the FPPTA</b> <i>Kim Prior, CPPT, Chief Executive Officer</i></p> <p><b>Board of Directors Election</b> <i>Statements by Candidates</i></p> <p><b>Raymond T. Edmondson Service Awards</b> <i>Tim Olsen, CPPT</i> <i>Katie Byrne, CPPT</i></p> <p><b>Raymond T. Edmondson Scholarship Awards</b></p> <p><b>Presentation of CPPT Awards</b> <i>Kim Prior, Chief Executive Officer</i></p>
9:15—9:30 am	<p><b>The Public Pension Community</b> <b>United for Tomorrow</b> <i>Dan Doonan, Executive Director</i> <i>National Institute on Retirement Security</i></p>
9:30—10:30 am	<p><b>Cybercrime, Identity Theft &amp; Scams</b> <i>Frank W. Abagnale</i> <i>Abagnale &amp; Associates</i></p>
10:30—11:30 am	<p><b>Morning Refreshment Break and Networking in the Exhibit Hall</b> <b>Panzacola 1—2</b></p>
11:30—12:45 pm	<p><b>Around the Public Pension Community</b> <i>Fred Nesbitt, PhD, FPPTA Education Committee—Moderator</i></p> <p><i>Dan Doonan, Executive Director</i> <i>National Institute on Retirement Security</i></p> <p><i>Alex Brown, Research Director</i> <i>National Association of State Retirement Administrators</i></p> <p><i>Hank Kim, Executive Director &amp; Counsel</i> <i>National Conference on Public Employee Retirement Systems</i></p>

**Monday, June 26, 2023**

**7:00 am—3:00 pm Conference Registration—Panzacola Ballroom Foyer**

12:45—2:15 pm	<b>Break for Lunch—On Your Own</b>
2:15—2:45 pm	<b>Resources Representing the Florida Pension Community</b> <i>Tyler Bond, Director of Research</i> <i>National Institute on Retirement Security</i>
2:45—4:15 pm	<b>Around the Investment World</b> <b>Perspectives From the Community</b> <i>Mike Spencer, Moderator</i> <i>FPPTA Education Committee</i>  <i>Global Economy</i> <i>David Lebovitz, JP Morgan Asset Management</i>  <i>Domestic Equities Markets</i> <i>Geoff Gerber, Twin Capital Management</i>  <i>Domestic &amp; International Bonds</i> <i>Howard Bos, Richmond Capital Management</i>  <i>International &amp; Emerging Markets</i> <i>Kurt Wood, DePrince Race &amp; Zollo</i>
4:15—5:30 pm	<b>Refreshment Break in Exhibit Hall</b> <b>Networking and Raffle</b>

*United for Tomorrow*



## Tuesday, June 27, 2023

**7:00 am—3:00 pm Conference Registration—Panzacola Ballroom Foyer**

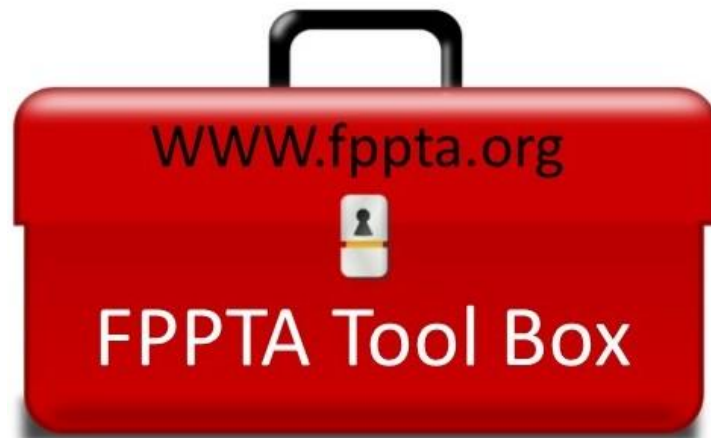
**7:00 am—8:00 am Continental Breakfast in the Exhibit Hall—Panzacola Ballroom 1—2**

<b>Panzacola Ballroom</b>	<b><i>The Public Pension Community—United for Tomorrow</i></b>
8:00—8:15 am	<b>Building a Team Within the Community</b> <i>Jack O’Callahan</i> <i>1980 Olympic Hockey Team—Miracle on Ice</i>
8:15—9:30 am	<b>Demography is Destiny</b> <i>Ken Gronbach</i> <i>President KGC Direct, LLC</i>
9:30—10:00 am	<b>Unintended Consequences: Actuarial Community</b> <i>Joe Griffin &amp; Sara Carlson</i> <i>Foster &amp; Foster Actuaries</i>
10:00—11:00 am	<b>Morning Refreshment Break—Networking in the Exhibit Hall</b> <b>Panzacola Ballroom 1—2</b>
11:00—11:30 am	<b>Unintended Consequences: Investment Consultant Community</b> <i>Dan Johnson &amp; Kerry Richardville</i> <i>AndCo Consulting</i>
11:30—11:45 am	<b>Defining the Fiduciary Role of the Trustee</b> <i>Don Trone, CEO</i> <i>Center for Board Certified Fiduciaries</i>
11:45 —12:45 pm	<b>New Paradigm for the Public Pension Community</b> <i>Russ Kamp, Moderator</i> <i>FPPTA Education Committee</i>  <i>Joe Griffin &amp; Sara Carlson</i> <i>Foster &amp; Foster Actuaries</i>  <i>Dan Johnson &amp; Kerry Richardville</i> <i>AndCo Consulting</i>
12:45—2:15 pm	<b>Break for Lunch—On Your Own</b>  <b>Board of Directors Meeting—Suwannee 13—14</b>

**Tuesday, June 27, 2023**

**7:00 am—3:00 pm Conference Registration—Panzacola Ballroom Foyer**

2:15—3:30 pm	<p><b>Fiduciary Prudence in Times of Headwinds</b></p> <p><i>Ash Williams, Vice Chairman</i> <i>JP Morgan Asset Management—Moderator</i></p> <p><i>Don Trone, CEO</i> <i>Center for Board Certified Fiduciaries</i></p> <p><i>Jerry Navarrete, Head of North American Institutional</i> <i>Newton Investment Management North America, LLC</i></p> <p><i>Rebecca White, CFA, Investment Analyst</i> <i>Newton Investment Management North America, LLC</i></p> <p><i>Ken Harrison, FPPTA Director Emeritus</i> <i>Sugarman, Susskind, Braswell &amp; Herrera</i></p>
3:30—4:15 pm	<p><b>FPPTA Annual Membership Meeting</b></p> <p><i>Reporting from the Board of Directors, Chief Executive Officer, Accountant, Auditor &amp; Attorney</i></p>
4:15—5:15 pm	<p><b>Refreshment Break in the Exhibit Hall</b> <b>Networking and Raffle</b></p>



**Wednesday, June 28, 2023**

**8:00 am—9:00 am Continental Breakfast in Panzacola Ballroom 1—2**

9:00—10:00 am

**Don't Get Scammed!**

**Smart Solutions to *Real Threats in a Hostile Environment***

*Bob Arno*

*Educator & Criminologist*

*Thank you for attending the 39th Annual Conference!*

Next year will be our 40th Anniversary, the Annual Conference will be held at the beautiful Renaissance at Sea World, June 23- 26, 2024. There will be some fun festivities planned so, be sure you save the date and come celebrate with us!





## 2023 & 2024 Calendar of Events

Trustees School	October 1 - 4, 2023	Sawgrass Marriott
Trustee School	January 28 – 31, 2024	Rosen Centre
Annual Conference 40 <sup>th</sup>	June 23 – June 26, 2024	Renaissance Orlando at Sea World
Trustees School	September 22 – 25, 2024	Hilton Bonnet Creek



**Save the Date**  
**Fall Trustee School**  
**October 1 – 4, 2023**  
**Sawgrass Marriott, Ponte Vedra Beach**

The next Trustee School will be held at the Sawgrass Marriott, Ponte Vedra Beach from October 1—4, 2023

October will be the 24th 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 goal of the Education Committee is to always provide a better program than the last. In 2021, the Education Committee completely redesigned the CPPT program from your suggestions in the survey evaluations. Thank you for sharing your thoughts and ideas.

