



Florida Public Pension Trustees Association

Fall Trustee School Program Agenda

Sawgrass Marriott Golf Resort & Spa
October 1—4, 2023



Saturday, September 30, 2023

2:00 pm Board of Directors Meeting

Sunday, October 1, 2023

3:00—6:00 pm	Trustee School Registration—Conference Area
4:15—5:00 pm	New Member Orientation
5:00—7:00 pm	Welcome Gathering



CPPT Program
Monday, October 2, 2023

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

General Session—All Attendees—Champions D,E

Check In—8:15 am 8:30—9:00 am	Tug of War: Recession or Soft Landing? Jeffrey Schulze Clearbridge Investment		
9:05—10:10 am	Leadership Starts with the Individual's Story Shayla Rivera Aerospace Engineer & Rocket Scientist with NASA		
10:10—10:30 am	Morning Refreshment Break—Masters & Champions Foyer		
	Basic	Intermediate	Advanced
10:30—11:00 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>
11:05—11:35 am	Board Meeting Basics <i>Steve Corbet, CPPT</i> <i>FPPTA Education Committee</i>	Investment Consultant Report <i>Dan Johnson</i> <i>AndCo Consulting</i>	Emerging Markets <i>Kurt Wood</i> <i>DRZ Investment Advisors</i>
11:40—12:10 pm	The Actuary <i>Eric Atwater</i> <i>Aon</i>	Equity Managers Meeting Report <i>Megan Anderson</i> <i>Nuveen</i>	Style Cycles—Seeing the Future Through the Past <i>Russ Kamp</i> <i>Ryan ALM</i>
12:10—1:30 pm	Break for Lunch - Tournament Hall (Lower Level) (Attendance Check-In must be completed by 1:15 pm)		
1:30 —2:00 pm	The Custodian <i>Karen Russo, CPPT</i> <i>Salem Trust Company</i>	Fixed Income Manager Report <i>Pat Kelly</i> <i>Agincourt Capital Management</i>	Building & Managing Your Real Estate Portfolio <i>Sabrina Unger</i> <i>American Realty Advisors</i>
2:05—2:35 pm	The Investment Consultant <i>Kerry Richardville</i> <i>AndCo Consulting</i>	Investment Consultant/ Asset Allocations <i>Mitchell Brennan</i> <i>BCA, Inc.</i>	Asset Allocation <i>Aaron Lally</i> <i>Meketa Investment Group</i>
2:40—3:10 pm	The Role of an Investment Manager <i>Anthony Xuereb, CPPT</i> <i>Polen Capital Management</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>
3:10—3:30 pm	Afternoon Refreshment Break—Masters & Champions Foyer		
3:30—4:30 pm	BASIC REVIEW	INTERMEDIATE REVIEW	ADVANCED REVIEW
4:30—11:00 pm	Hospitality Room and Study Hall—Tournament Hall		

CPPT Program
Tuesday, October 3, 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>	Basic	Intermediate	Advanced
8:30—9:00 am	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>	Real Assets <i>David Lee</i> <i>Dahab & Associates</i>
9:05—10:10 am <i>65 minute sessions</i>	Introduction to Ethics <i>Kenneth Harrison, CPPT</i> <i>Sugarman Susskind Braswell & Herrera</i>	Chapter 112—175—185 <i>Adam Levinson</i> <i>Klausner Kaufman Jensen & Levinson</i>	Trustee Ethics <i>Caroline Klancke</i> <i>Florida Ethics Institute</i>
10:10—10:30 am	Morning Refreshment Break—Masters & Champions Foyer		
10:30—11:00 am	Modern Portfolio Theory & Benchmarking <i>Steve Roth, CPPT</i> <i>Dahab Associates</i>	Disability Process <i>Pedro Herrera</i> <i>Sugarman Susskind Braswell & Herrera</i>	Fixed Income Markets <i>Jeff Detwiler</i> <i>Garcia Hamilton & Assoc.</i>
11:05—11:35 am	Capital Markets—Equity <i>Geoff Gerber</i> <i>Twin Capital Management</i>	<i>(65 Minute Session)</i>	Private Equity <i>Alex Tatum</i> <i>Constitution Capital Partners</i>
11:40—12:10 pm	Capital Markets - Fixed Income <i>Paul Lundmark, CPPT</i> <i>Richmond Capital Management</i>	The Actuarial Report <i>Sara Carlson</i> <i>Foster & Foster Consulting</i>	Review of Risk & Volatility <i>Steve Roth, CPPT</i> <i>Dahab & Associates</i>
12:10—1:30 pm	Break for Lunch—Tournament Hall (Lower Level) Education Committee Meeting—		
1:30—2:00 pm	Introduction to Real Estate <i>Tim Nash</i> <i>Intercontinental Real Estate</i>	Real Estate Performance Report <i>Deb Schwartz</i> <i>Barings</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—Masters & Champions Foyer		
3:30—4:30 pm	Basic Review	Intermediate Review	Advanced Review
4:00—11:00 pm	Hospitality Room and Study Hall—Tournament Hall		



Continuing Education Program

Monday, October 2, 2023

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

Attendance Check-In must be completed by 8:15 am	General Session Champions D,E		
8:30—9:00 am	Tug of War: Recession or Soft Landing? Jeffrey Schulze Clearbridge Investment		
9:05—10:10 am	Leadership Starts with the Individual's Story Shayla Rivera Aerospace Engineer & Rocket Scientist with NASA		
10:10—10:30 am	Morning Refreshment Break		
	Classroom A	Classroom B	Classroom C
10:30 —11:00 am	How Change Agents Impact Real Estate Sabrina Unger American Reality Advisors	Finding Certainty in Uncertain Markets Brian Elliott Gentry Capital Management	De-Risking Your Asset Allocation Russ Kamp Ryan ALM, Inc.
11:05—11:35 am	Why Investing in Quality Companies Matters More Now Than Ever Alex Torrens & Gustavo Bikkesbakker Walter Scott & Partners	Modernize Your Equity Allocation to Capture Innovative Growth Companies Melanie Coffin Lord Abbett	Real Estate: Supporting Global Macro-trends Through Niche Subsector Investments Meghan Burke Macquarie Asset Management
11:40—12:10 pm	Bonds: Finally Looking Attractive Pat Kelly Agincourt Capital Management	Rates & Recession—Where Are We? Beth Bowen ACG Consulting	Benefits of Timber & Farmland Amy Haynes Manulife Investment Management
12:10—1:30 pm	Break for Lunch—Tournament Hall (Lower Level) (Attendance Check-In must be completed by 1:15 pm)		

Conference Area Wi-Fi Code:

Continuing Education Program
Monday, October 2, 2023



	CEU Continued		
	Classroom A	Classroom B	Classroom C
1:30—2:35 pm (65 Minute Sessions)	Lessons Learned from the Banking Crisis Hannah Ross Bernstein Litowitz Berger & Grossman, LLP and Adam Savett, Wolf Popper, LLP	Tickling the Dragon Tail: Examining Increased Liquid Holdings in a Time of Stress Kevin Kneafsey Allspring Global Investments	Investing in Agriculture Brian Philpot AGAmerica
2:40—3:10 pm	Private Equity Investment Opportunities Laureen Costa JP Morgan Asset Management	Global Farmland John Goodreds Nuveen	Cyber Security Best Practices John Reidy Pension Technology Group
3:10—3:30 pm	Afternoon Refreshment Break		
	General Session Champions D, E	Classroom A	
3:30—4:30 pm	Implications of A.I. and Data Analytics on Investing Chris Liedtke BentallGreenOak	FPPTA Data Center—New Update Fred Nesbitt, PhD FPPTA Media Consultant	
4:30—11:00 pm	Hospitality Room and Study Hall		



Continuing Education Program

Tuesday, October 3, 2023

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

Attendance Check-In must be completed by 8:15 am	General Session Champions D,E		
8:30—9:55 am	Re-Thinking Your Allocation to Fixed Income <i>Dave West—Moderator AndCo Consulting</i> <i>Steve Shekane Constitution Capital Partners</i> <i>Jeff Detwiler Garcia Hamilton</i> <i>Chet Piapanandiker Barrow & Hannaway</i>		
9:55—10:10 am	Epilogue <i>Burgess Chambers Burgess Chambers & Associates</i>		
10:10—10:30 am	Morning Refreshment Break		
	Classroom A	Classroom B	Classroom C
10:30 —11:35 am (65 Minute Sessions)	Time to Consider the Appropriateness of COLA's <i>Brad Armstrong & Pete Strong Gabriel Roeder Smith & Company</i>	Navigating the Landscape of Real Estate <i>Scott Owens—Moderator Graystone Consulting</i> <i>Andrew Brett Intercontinental Real Estate</i> <i>Preston Sargent Bailard, Inc.</i> <i>Dara Friedman BentallGreenOak</i>	<i>No Session</i>
11:40—12:10 pm	Impacts of Increased Market Risks on Pension Plans <i>Geoff Gerber Twin Capital Management</i>	What's Going on Across the Pond: Developments in International Investing <i>Andrew DeVizio Polen Capital Management</i>	Infrastructure <i>Luke Henderson BlackRock</i>
12:10—1:30 pm	Break for Lunch—Tournament Hall (Lower Level) (Attendance Check-In must be completed by 1:15 pm)		

Continuing Education Program
Tuesday, October 3, 2023



	CEU Continued		
	Classroom A	Classroom B	Classroom C
1:30—2:00 pm	Behavioral Finance <i>David Lee</i> <i>Dahab & Associates</i>	Actuarial Sound Contribution Rates <i>Kevin Spanier</i> <i>Buck</i>	What is Alpha and Why is it Important to Understand When Evaluating Performance <i>Anthony Brooks</i> <i>Sawgrass Asset Management</i>
2:05—2:35 pm	Debunking the Myths of ESG <i>Rebecca White</i> <i>Newton Investment Management</i>	Setting Actuarial Assumptions & Trends <i>Sara Carlson</i> <i>Foster & Foster</i>	Understanding Bonds and NOT the 007 Kind <i>Mark Anderson</i> <i>National Investment Services</i>
2:40—3:10 pm	Investment Tips for Plan Fiduciaries <i>Tyler Grumbles</i> <i>AndCo Consulting</i>	Supply Chain Investing <i>Stephen Feinberg</i> <i>Cereberus Capital Management</i>	The Case For and Against Shareholders Litigating ESG Issues <i>Adam Savett</i> <i>Wolf Popper, LLP</i>
3:10—3:20 pm	Afternoon Refreshment Break		
4:00—11:00 pm	Hospitality Room and Study Hall		

Winter Trustee School
January 28—31, 2024
Rosen Centre

Are you thinking about starting the CPPT program? Why not start fresh in the new year! You won't regret furthering your education and knowledge to preform as a competent fiduciary for the plan. Your beneficiaries will thank you! Join the over 2,000 public pension trustees and associates who have completed the program. You'll gain the confidence and expertise you'll need to become a leader in the public pension community.





Fall Trustees School
Wednesday, October 4, 2023
7:00 am—9:00 am Continental Breakfast



	Basic	Intermediate	Advanced
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		
9:00—10:00 am Attendance Check -In must be completed by 8:45 am	FPPTA Legal Panel Ken Harrison, Sugarman Susskind Braswell & Herrera —Moderator Adam Levinson Klausner Kauffman Jensen Levinson Ron Cohen and Ricki Levy Lorium Law		

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. QR 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.