



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

Conference Area Wi-Fi Code:



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	US Economy Update Jeffrey Schulze Clearbridge Investment		
9:05—10:10 am	Leadership Starts with the Individual 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> Resource Centers	FPPTA Pension Plan Data Center <i>Fred Nesbitt, PhD.</i> FPPTA Education Committee	Modification of Pension Plans <i>Mark Floyd, Esq.</i> Mierzwa & Floyd, PA
11:05—11:35 am	Board Meeting Basics <i>Steve Corbet, CPPT</i> FPPTA Education Committee	Investment Consultant Report <i>Dan Johnson</i> AndCo Consulting	Emerging Markets <i>Kurt Wood</i> DRZ Investment Advisors
11:40—12:10 am	The Actuary <i>Eric Atwater</i> Aon	Equity Managers Meeting Report <i>Megan Anderson</i> Nuveen	Style Cycles—Seeing the Future Through the Past <i>Russ Kamp</i> Ryan ALM
12:10—1:30 am	Break for Lunch - Tournament Hall (Lower Level) (Attendance Check-In must be completed by 1:15 pm)		
1:30 am —2:00 pm	The Custodian <i>Karen Russo, CPPT</i> Salem Trust Company	Fixed Income Manager Report <i>Pat Kelly</i> Agincourt Capital Management	Building & Managing Your Real Estate Portfolio <i>Sabrina Unger</i> American Realty Advisors
2:05—2:35 am	The Investment Consultant <i>Kerry Richardville</i> AndCo Consulting	Investment Consultant/ Asset Allocations <i>Mitchell Brennan</i> Burgess Chambers & Assoc.	Asset Allocation <i>Aaron Lally</i> Meketa Investment Group
2:40—3:10 pm	The Role of an Investment Manager <i>Anthony Xuereb, CPPT</i> Polen Capital Management	Introduction to Alternative Investments <i>Jordan Jackson</i> JP Morgan Asset Mgt.	Impact of Changing Actuarial Assumptions <i>Chad Little</i> Freiman Little Actuaries
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 Lorium Law</i>	Understanding Non- Traditional Assets <i>Beth Bowen Asset Consulting Group</i>	Real Assets <i>David Lee Dahab & Associates</i>
9:05—10:10 am <i>65 minute sessions</i>	Introduction to Ethics <i>Kenneth Harrison, CPPT Sugarman Susskind Braswell & Herrera</i>	Chapter 112—175—185 <i>Adam Levinson Klausner Kaufman Jensen & Levinson</i>	Trustee Ethics <i>Caroline Klancke 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 Dahab Associates</i>	Disability Process <i>Pedro Herrara Sugarman Susskind Braswell & Herrera</i>	Fixed Income Markets <i>Jeff Detwiler Garcia Hamilton & Assoc.</i>
11:05—11:35 am	Capital Markets—Equity <i>Geoff Gerber Twin Capital Management</i>	<i>(65 Minute Session)</i>	Private Equity <i>Alex Tatum Constitution Capital Partners</i>
11:40—12:10 pm	Capital Markets - Fixed Income <i>Paul Lundmark, CPPT Richmond Capital Management</i>	The Actuarial Report <i>Sara Carlson Foster & Foster Consulting Actuaries</i>	Review of Risk & Volatility <i>Steve Roth, CPPT Dahab Associates</i>
12:10—1:30 pm	Break for Lunch—Tournament Hall (Lower Level) Education Committee Meeting—		
	Introduction to Real Estate <i>Tim Nash Intercontinental Real Estate</i>	Real Estate Performance Report <i>Deb Schwartz Barings</i>	Why Securities Litigation <i>Maya Saxena Saxena White</i>
	Investment & Economic Cycles <i>Steve Stack Highland Capital Management</i>	Managing Your Service Provider <i>Dwight Mattingly, CPPT FPPTA Education Committee</i>	Establishing a Funding Policy <i>Pete Strong Gabriel Roeder & Smith</i>
	Diversifying Your Equity Portfolio <i>Jason Turner Great Lakes Advisors</i>	Investment Consultant/ Manager Search <i>Scott Owens Graystone Consulting</i>	Maximizing Your FPPTA Resources <i>Sean McKinstry, CPPT 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		



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 Bonni Jensen Klausner Kauffman Jensen Levinson Ron Cohen Lorium Law Mark Floyd Mierzwa & Floyd, PA		

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 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.