

FPPTA 40th Annual Conference & Expo

Shaping the Future: Trustee by Trustee



Florida Public Pension Trustees Association
June 23 — 26, 2024
Renaissance Orlando at Sea World



Schedule of Events

Saturday, June 22nd
2:00—5:00 pm Board of Directors Meeting Tarpon (second floor)
Sunday, June 23rd
Annual Associate Charitable Golf Classic Hawk's Landing Golf Course 8:00 am Shotgun Start
12:00—5:00 pm Exhibitors Move In Oceans Ballroom 7—12
3:00—6:00 pm Event Registration Oceans Ballroom Foyer
5:00—7:00 pm Exhibit Hall and Welcome Gathering Oceans Ballroom 7—12 6:00 pm Raffle Drawing

Monday, June 24th	Exhibit Hall Schedule Oceans Ballroom 7—12
7:00—8:00 am	Trustee Networking Continental Breakfast Exhibit Hall
8:00—9:15 am	Exhibit Hall Closed for Opening Ceremonies
9:15—12:30 pm	Board of Directors Election Booth Open
2:30—5:30 pm	
10:30—11:30 am	Trustee Networking Morning Refreshment Break Exhibit Hall
12:30—2:15 pm	Break for Lunch—On Your Own Exhibit Hall Closed
4:00—5:00 pm	Trustee Networking Refreshment Break & Raffle Exhibit Hall
Tuesday, June 25th	Exhibit Hall Schedule Oceans Ballroom 7—12
7:00—8:00 am	Trustee Networking Continental Breakfast Exhibit Hall
7:00—12:30 pm	Board of Directors Election Booth Open
10:00—11:00 am	Trustee Networking Morning Refreshment Break Exhibit Hall
12:30—2:15 pm	Break for Lunch—On Your Own Exhibit Hall Closed
12:30—2:15 pm	Board of Directors Meeting Tarpon (second floor)
3:00 pm	Exhibit Hall Closed
3:00—4:00 pm	Annual Membership Meeting
4:00—4:30 pm	Refreshment Break & Raffle in Oceans 1—6 directly after Annual Membership Meeting
5:30—9:30 pm	40th Annual Celebration! Dinner Club and Concert

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 onsite.*

Monday, June 24, 2024

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

7:00 am—8:00 am Continental Breakfast in the Exhibit Hall—Oceans Ballroom 7—12

Oceans Ballroom
1—6

8:00—9:15 am

Presentation of Colors
Orange County Fire Rescue Color Guard

Conference Welcome Address

Pete Prior, Board of Directors Chairman

The State of the FPPTA

Kim Prior, Chief Executive Officer

Board of Directors Election

Ken Harrison, Chairman of Election Committee
Statements from Candidates

Special Recognition Award

Pete Prior, Board of Directors Chairman & Kim Prior, Chief Executive Officer

Steve Aspinall, Director Emeritus
Mike Spencer, Education Committee
Tom Thompson, FPPTA Announcer

Raymond T. Edmondson Service Award

Kim Prior, Chief Executive Officer

Raymond T. Edmondson Scholarship Awards

Chris Spencer, Chairman of the Scholarship Committee

Presentation of CPPT Awards

Kim Prior, Chief Executive Officer

9:15—9:30 am

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Focus on Trustees—Opening Video

Shaping the Future: Trustee by Trustee
.....

9:30—10:30 am

A Culture of Empathy: Shaping the Future with a New Approach to Leadership

Mallory Brown

Adventure Traveler, Filmmaker and Global Humanitarian



Empathy as a driving force to problem solving can cultivate trust, collaboration, and innovation. Mallory Brown shares her humanitarian mindset, with real-life stories of human connection from all over the world, to provide tools to help people discover a deeper meaning of success and what they can do to impact positive change.

10:30—11:30 am

Morning Refreshment Break and Networking in the Exhibit Hall
Oceans Ballroom 7—12

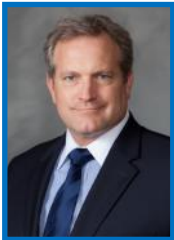


Monday Afternoon

Shaping the Future: Trustee by Trustee

11:30—12:30 pm **From Good to Great: How Leadership and Stewardship Behaviors Can Improve the Quality of Decision—Making**

*Sean Hannah, PhD
Colonel, U.S. Army, Retired
Wake Forest University*



Within any organization or board, there are certain qualities and behaviors leaders can and should rely on that contribute to integrity and quality of the institution they represent. Clear communication, empowerment, risk management, and ethical leadership improve the quality of decision-making and the overall strength of the body. To be a good steward is to understand the responsibilities of the role and ensure the decisions are made in the best interest of the mission. Dr. Hannah will draw upon his experiences in Operation Desert Storm and in the aftermath of 9/11 to identify key concepts of leadership and governance.

12:30—2:15 pm

Break for Lunch—On Your Own

2:15—2:45 pm

The New Order: Leverage Finance in an Asset Management World

*Randy Schwimmer
Nuveen*



Post-pandemic capital markets have survived Covid shutdowns, supply-chain crises, high inflation, high interest rates and threats of a recession. At the same time, banks retreated from high-yield credit as liquidity was drained from the financial system. Private credit managers, propelled by investor appetite for consistent, premium yields for less-correlated assets, took over buy-out financing with a vengeance.

2:45—3:15 pm

Active, Passive & In-Between Equity Strategies

*Geoff Gerber, Ph.D
Twin Capital Management*



Active, Passive & In-Between Equity Strategies will address how a trustee should think about structuring their equity portfolio with respect to active, passive, and other equity strategies (such as enhanced indexing or lower volatility) to earn the equity market return (with some potential alpha) but lower their overall equity portfolio risk.

3:15—3:45 pm

The World of Fixed from a Consultant Perspective

*Evan Scussel
Mariner Institutional*



Since the Global Pandemic, capital markets worldwide have seen interest rates fall to historic lows, inflation accelerate, interest rates increase, inflation start to moderate, the equity markets go down substantially and then roar back to record levels. What does this mean for fixed income as an asset class? Evan Scussel, Managing Director of Research at Mariner Institutional (formerly AndCo Consulting), will discuss how institutional plans should think about fixed income investing in a dynamic world. With the proliferation of new investment products within the fixed income asset class and with new income enhancement opportunities.

3:45—4:45 pm

Refreshment Break in Exhibit Hall

Networking and Raffle

Tuesday, June 25, 2024

7:00 am—3:00 pm Conference Registration—Oceans Ballroom Foyer
7:00 am—8:00 am Continental Breakfast in the Exhibit Hall—Oceans Ballroom 7—12

**Oceans
Ballroom 1—6**

Shaping the Future: Trustee by Trustee

8:00—8:15 am

Greg Bell

Trustee Training



Greg Bell checks in with the FPPTA membership to give them an exciting update on future FPPTA programs. Greg will be working with the FPPTA to develop and deliver a series of workshops based on his Water the Bamboo philosophy meant to develop decision making skills and create cultures of team building and consensus to better serve you in your roles as trustees and all facets of professional, personal, and social life.

8:15—8:45 am

Role and Responsibilities of a Public Trustee

*Von Hughes, Author
Morgan Stanley*



Von Hughes is an adjunct professor at Columbia University and managing director of Calvert Research and Management. Von is the author of the award-winning book “U.S. Public Pension Handbook: A Comprehensive Guide for Trustees and Investment Staff.” In this introductory session, Von will discuss the reasons he wrote his book and emphasize the important work trustees do for their beneficiaries and their communities.

8:45—10:00 am

The Art of Presenting Persuasively

*Terri Sjodin
Sjodin Communications*



What are the twelve biggest presentation mistakes people make and how do you avoid them? Terri will demonstrate how to build and deliver more polished and effective communications – to be not just informative, but also persuasive. She will focus on developing verbal communication skills for greater impact with target audiences, including how to develop a more creative style and tips on visual aids, body language, closing and more.

10:00—11:00 am

Morning Refreshment Break—Networking in the Exhibit Hall
Oceans 7—12

11:00—11:45 am

Geopolitical Outlook

*Brendan Mulhern
Newton Investment Management*



After an extended period of cooperation between the world’s major nations/economies, in recent years investors have again been forced to start thinking about the geopolitical risk in their portfolios. While the focus tends to be on potential event risks, such as the risk of China invading Taiwan, in this presentation we are going to explore the longer-term market consequences of this shift from an era of goodwill to an era of geopolitical competition.

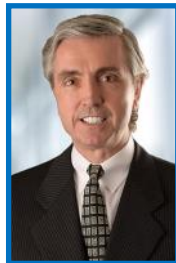


Tuesday, Afternoon Shaping the Future: Trustee by Trustee

11:45—12:30 pm **Baby Boomers and the Great Resignation: A Pension Actuary’s Perspective on Labor Market Demographics**

*Brad Armstrong
Shelly Jones
Israel Bichachi
Gabriel Roeder Smith Consulting*

The Covid-19 pandemic accelerated the retirements of many workers of the baby boomer generation. In the pandemic’s wake, actuaries are now facing a new reality and challenges posed by a shifting workforce. Actuaries play a critical role in analyzing and managing risks to ensure the long-term financial stability of pension funds. This panel discussion will focus on how actuaries are accounting for these workforce shifts and what this new dynamic means for pension funds.



12:30—2:15 pm

**Break for Lunch—On Your Own
Board of Directors Meeting—Tarpon (second floor)**

2:15—3:00 pm

**The Future of the FPPTA
Planning the Future: Trustee by Trustee**

*Mentorship Program
Orientation & CPPT Expansion
Water the Bamboo Training
The Connect Initiative
FPPTA Website & Member Dashboard
Trustee Leadership Council*

As the FPPTA celebrates forty years of trustee education, FPPTA staff and consultants will walk the membership through the launch of new programs and services to better serve public pension trustees. Whether a new trustee joining the association for the first time, or seasoned veterans who have served as a trustee for decades, the FPPTA is committed to providing membership with a holistic approach to education.





Tuesday, Afternoon Shaping the Future: Trustee by Trustee

Exhibit Hall is closing at 3:00 pm to allow our exhibitors time to pack up their booth and attend the 40th Anniversary Dinner and Concert.

The afternoon break and raffle will take place directly after the Annual Membership Meeting in the same room.

3:00—4:00 pm

FPPTA Annual Membership Meeting

Reporting from the Board of Directors, Chief Executive Officer, Accountant, Auditor & Attorney on the health of the FPPTA

All members are invited to attend

4:00—4:30 pm

**Refreshment Break and Raffle in Oceans 1—6
Directly after the Annual Membership Meeting**



40th Anniversary Dinner Club and Concert

Only Attendees who Pre-Registered for the Dinner

5:30—6:30 Cocktail reception in the Atrium

*6:30—9:30 pm Dinner Club and Concert in Crystal Ballroom
The Eagles Tribute Band “Bote” will preform all of The Eagles greatest hits!*





Wednesday, June 26, 2024

7:00 am—8:00 am Continental Breakfast in the Exhibit Hall—Oceans Ballroom Foyer

9:00—10:00 am

Taking Chance



**Lt. Colonel Micheal Strobl
US Marine Corp (retired)**

Michael Strobl shares the story of his time in the Marine Corps and a journey of accompanying home the body of a marine who had been killed in Iraq. His story is featured in the critically acclaimed movie Taking Chance. His story is an emotional and powerful message that emphasizes the need to do the right thing, even when no one is looking.

Thank you for attending the 40th Anniversary Annual Conference!

Save the date!
*Fall Trustees School
September 22—25, 2025
Hilton Bonnet Creek*





FPPTA Educational Initiatives



CPPT Orientation is Expanding!

CPPT Orientation is evolving from an introduction to a full-day immersion, tailored to equip you with the tools and insights needed to navigate the complexities of public pension management. Trustees entering into the CPPT program will be required to come a day early and attend a full day of sessions on Sunday, September 22nd.

The newly designed orientation program will offer a dive deep into the intricacies of the CPPT program and delve into the rich tapestry of public pension history, explore FPPTA resources, and gain invaluable insights from renowned authors and thought leaders.



Trustee Leadership Council

We are introducing a new certification program for the seasoned trustees. The Trustee Leadership Council will launch at the Fall Trustee School at Hilton Bonnet Creek, September 22-25th.

TLC training is where theory meets practice in a dynamic learning experience spanning from September, 2024 to April, 2025. Participants will be grouped into teams and tasked with creating a municipal pension plan from the ground up using the training and leadership skills they'll receive throughout the program and their prior FPPTA education.

The program has three levels: two levels of training/learning (as a new program at each of our two annual Trustee Schools), and the third level, a stand-alone event held over a three-day period. This program does require a commitment from participants to attend all three events.