



Upcoming Events

Trustee School

January 26 – 29, 2025
Renaissance Orlando at
Seaworld

41st Annual Conference

June 22 – 25, 2025
Omni Orlando Resort
at Champions Gate

Trustee School

October 5 – 8, 2025
Sawgrass Marriott Golf
Resort & Spa



Meet our Staff



Kim Prior
Chief Executive Officer
kim@fppta.org



MJ Chwalik
Chief Operating Officer
mj@fppta.org



Cindy Berta
Finance Manager
cindy@fppta.org



Sean McKinstry
Assistant Director
of Education
seanmckinstry@fppta.org



Lois Edmondson
Membership &
Registration Specialist
lois@fppta.org



Brenda Crivelli
CPPT Coordinator
brenda@fppta.org



Candice Lee
Graphic Designer
candice@fppta.org



Consultants



Peter Hapgood
Director of Education
peterhapgood@fppta.org



Susan Marden
Public Relations
smard2@verizon.net



Fred Nesbitt
Media
fnesbitt911@gmail.com

FALL TRUSTEE PROGRAM AGENDA

September 22 – 25, 2024
Hilton Bonnet Creek

Shaping the Future - Trustee by Trustee



Schedule of Events

Saturday, September 21

2:00 PM – BOD Meeting

Sunday, September 22

7:00 AM – CPPT / FPPTA Orientation Registration

8:15 AM – CPPT / FPPTA Orientation Program

12:15 PM – Lunch Break

1:15 PM – FPPTA Mentoring Program

2:15 PM – Water the Bamboo – Keynote

3:00 PM – Trustee School Registration

5:00 PM – Welcome Gathering

Monday, September 23

6:45 AM – Continental Breakfast

7:45 AM – Morning Check-In

8:00 AM – Lead Like a Bamboo Farmer / All Attendees

1:15 PM – Afternoon Check-In

3:10 PM – Afternoon Check-Out

4:30 PM – Hospitality Room & Study Hall

Tuesday, September 24

7:00 AM – Continental Breakfast

8:15 AM – Morning Check-in

8:30 AM – CPPT & CEU Sessions

12:10 PM – FPPTA Education Committee Lunch

1:15 PM – Afternoon Check-In

3:10 PM – Afternoon Check-Out

4:30 PM – Hospitality Room & Study Hall

Wednesday, September 25

7:45 AM – Continental Breakfast

8:45 AM – FPPTA Survey Results

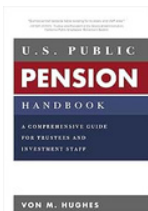
9:00 AM – Post Traumatic Stress Disorder – Keynote

10:15 AM – Morning Check-Out



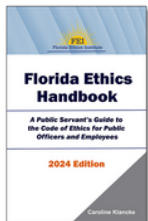
New Resources for Attendees

The FPPTA is also excited to roll out several new resources for our members as well. Here's a preview:



The U.S. Public Pension Handbook

A Comprehensive Guide for Trustees and Investment Staff by Von Hughes will be provided to every trustee. This textbook is the quintessential guide to the inner workings of plan design, institutional investment, and administration of public pension plans.



The Florida Ethics Handbook 2024 Edition

A Public Servant's Guide to the Code of Ethics for Public Officers and Employees by Caroline Klancke is a comprehensive guide to ethics laws in Florida. The Florida Ethics Handbook is the only guide that synthesizes up-to-date ethics laws applicable to public officers and employees on the state and local levels of Florida government, related Florida constitutional provisions, as well as relevant advisory opinions issued by the Florida Commission on Ethics.

Dear attendee,

We're excited to roll out some changes at this Fall Trustee School. If you attended our 40th Annual Conference, then you already know the FPPTA is rolling out new programs and enhancements to our existing educational offerings. Here's a preview of what you can expect at this trustee school and going forward.

FPPTA & CPPT Expanded Orientation

First, the CPPT program is expanding the orientation program. We know your first event can be a lot to take in and trustees can be overwhelmed by the size, scope, and many moving parts of FPPTA schools. We have incorporated a new Sunday orientation program to get new members and new trustees acclimated to the FPPTA. Trustees entering the CPPT program must attend the Sunday orientation before entering the CPPT Basic class starting on Monday. During this orientation you will learn about the association, the tools and resources available to you, and some basic concepts and history that will give you context into the world of public pensions and importance of defined benefit plans for Florida's public servants and the communities they serve.

Orientation is required for CPPT enrollees but is not limited to enrollees. Anyone is welcome to attend the orientation program, and in fact, everyone is encouraged to at least attend the Water the Bamboo keynote address by Greg Bell on Sunday afternoon (more about the Water the Bamboo training on the next page). Be sure to view the full schedule of orientation sessions on page ____.

CPPT Program Enhancement

As trustees it's important that you have a solid understanding of the design and functionality of defined benefit plans, and this has been and will continue to be the core of the CPPT curriculum. Trustees hold a massive responsibility in their role overseeing the fund that will provide beneficiaries the retirement security they were promised at the end of their career in public service. Equally important is the decision-making process trustees utilize in ensuring the pension fund can meet its obligations and don't run afoul of the law. The CPPT program has now incorporated behavioral governance and enhanced ethics training into each of the Basic, Intermediate, and Advanced curriculums to both sharpen your critical thinking skills in your role and protect trustees from legal and regulatory statutes.

Kim Prior



Water The Bamboo Training Seminars



Future Schedule:

2025

Monday- January 27th
'Don't Farm Alone'

2026

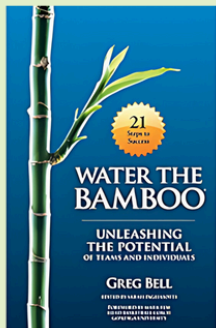
Monday - February 2
'Adapt Like Bamboo'

Monday - October 6th
'Bamboo Farmer
Mindset'

Water the Bamboo Training

The FPPTA has hired Greg Bell to share with our trustee and associate members a unique and joyful approach to time-tested management concepts. Greg's distinctive outlook on maximizing your potential will propel you toward significant growth for life, work and becoming a better trustee. Similar to a bamboo farmer nurturing their crop, educating trustees is a gradual process that requires time and dedication to grasp the multifaceted aspects essential for optimal trustee performance.

The FPPTA's engagement with Greg Bell will be over the next (4) Trustee Schools. Every Monday, a general training session for all Trustee School attendees will be conducted by Greg. After more than a decade of working with and studying successful people, teams, and organizations, Greg has realized that every person, every team, every family, every organization, and every social cause could benefit from understanding the principles giant timber bamboo teaches us about amazing growth and success.



"Water The Bamboo: Unleashing the Potential of Teams and Individuals," by Greg Bell, helps individuals and teams refocus on their core values and mission to achieve long-term success. Providing pension boards with a culture of collaboration and purpose will lead to more constructive meetings and quality consensus.



CPPT & ORIENTATION PROGRAM

SUNDAY
SEPTEMBER 22, 2024

General Session

8:30 - 8:45 AM

Welcome - Kim Prior
Program Review - Sean McKinstry

1

8:45 - 9:15 AM

U.S. Pension Trustee Handbook
Von Hughes

2

9:15 - 9:30 AM

Shaping the Future - Trustee by Trustee
Sean McKinstry

3

9:30 - 10:15 AM

Capacity to Serve as Exemplary Leaders & Stewards
Don Trone

4

10:15 - 10:30 AM

Morning Break

10:30 - 11:15 AM

FPPTA Resources
Sean McKinstry & Fred Nesbitt

5

11:15 - 12:15 PM

The History of Public Pensions
Adam Levinson
Klausner, Kauffman, Jensen & Levinson, PA

6

12:15 - 1:15 PM

Lunch Break

1:15 - 2:00 PM

The FPPTA Trustee Mentoring Program
Gee Cowan & Norris Park

7

2:00 - 3:30 PM

Water the Bamboo - Keynote
Greg Bell
Thought Leader, Business Consultant, Leadership Coach

8



Download the
FPPTA App!



Wifi Password



CPPT AGENDA

MONDAY

SEPTEMBER 23RD, 2024

Attendance Check-In must be completed by 7:45 AM.

General Session

7:50 - 8:00 AM	FPPTA Opening Comments <i>Housekeeping Video</i>		1
8:00 - 10:00 AM	Lead Like a Bamboo Farmer Greg Bell <i>Thought Leader, Business Consultant, Leadership Coach</i>		2
10:00 - 10:30 AM	Morning Refreshment Break		
	Basic	Intermediate	Advanced
10:30 - 11:00 AM	Board Meeting Basics Steve Corbet <i>FPPTA Education Committee</i>	FPPTA Pension Plan Data Center Fred Nesbitt, PhD <i>FPPTA Education Committee</i>	Private Equity Rob Hatch <i>Constitution Capital Partners</i>
11:05 - 11:35 AM	Behavioral Governance - Decision Making Don Trone <i>Center For Board Fiduciaries</i>	Chapter 112 - 175 - 185 Adam Levinson <i>Klausner, Kaufman, Jensen, & Levinson, PA</i>	Review of Risk & Volatility Steve Roth, CPPT <i>Dahab & Associates</i>
11:40 - 12:10 PM	The Custodian Mark Rhein <i>Salem Trust Company</i>	(60 minutes)	Fixed Income Markets Jeff Detwiler <i>Garcia Hamilton & Associates</i>
12:10 - 1:30 PM	Lunch Break		
1:30 - 2:00 PM	The Administrator Scott Baur <i>Resource Centers</i>	Investment Consultant Report Greg White <i>Investment Performance Services LLC</i>	Emerging Markets Kurt Wood <i>DRZ</i>
2:05 - 2:35 PM	The Actuary Eric Atwater <i>Aon</i>	Advancing Ethics & Professionalism Caroline Klancke <i>Florida Ethics Institute</i>	Private Debt Laura Stolfi <i>Nuveen</i>
2:40 - 3:10 PM	The Investment Consultant Tyler Grumbles <i>Mariner</i>	(60 minutes)	Modifications of Pension Plans Mark Floyd <i>Mierzwa & Floyd, P.A.</i>
3:10 - 3:30 PM	Afternoon Refreshment Break		
3:30 - 4:30 PM	Basic Review Gequita Cowan Norris Parks Anthony Xuereb Steve Aspinall	Intermediate Review Lynn Bernstein Katie Byrne Warren West	Advanced Review Phyllis Shaw Kerry Richardville Matt Hettler



CPPT AGENDA

TUESDAY

SEPTEMBER 24TH, 2024

Attendance Check-In must be completed by 8:15 AM.

	Basic	Intermediate	Advanced
8:30 - 9:00 AM	Ethics in Action Kenneth Harrison <i>Sugarman & Susskind</i>	Equity Managers Meeting Report Megan Anderson <i>Nuveen</i>	Disability Process Pedro Herrara <i>Sugarman & Susskind</i>
9:05 - 9:35 AM	Caroline Klancke <i>Florida Ethics Institute</i>	The Fixed Income Manager Report Ryon Acey <i>Agincourt Capital Management</i>	(60 minutes)
9:40 - 10:10 AM	The Attorney Ricki Levy <i>Lorium Law</i>	The Actuarial Report Sara Carlson <i>Foster & Foster Consulting</i>	Establishing a Funding Policy Pete Strong <i>Gabriel Roeder & Smith</i>
10:10 - 10:30 AM	Morning Refreshment Break		
10:30 - 11:00 AM	The Role of an Investment Manager Anthony Xuereb <i>Polen Capital Management</i>	Investment Consultant/ Asset Allocation Mitchell Brennan <i>BCA, Inc</i>	Impact of Changing Actuarial Assumptions Chad Little <i>Freiman Little Actuaries</i>
11:05 - 11:35 AM	The Importance of Diversification Jason Turner <i>Great Lakes Advisors</i>	Real Estate Performance Report Maya Packer <i>Barings</i>	Ethics Master Class Caroline Klancke <i>Florida Ethics Institute</i>
11:40 - 12:10 PM	Investment & Economic Cycles Kerry Richardville <i>Mariner</i>	Investment Consultant/ Manager Search Scott Owens <i>Graystone Consulting</i>	(60 minutes)
12:10 - 1:30 PM	Lunch Break		
1:30 - 2:00 PM	Introduction to Real Estate Tim Nash <i>Intercontinental Real Estate</i>	Behavioral Governance - Leadership Don Trone <i>Center for Board Fiduciaries</i>	Capital Markets - Equity Geoff Gerber <i>Twin Capital Management</i>
2:05 - 2:35 PM	Equity Markets Brad Penter <i>Callan, LLC</i>	Asset Allocation Aaron Lally <i>Meketa Investment Group</i>	Real Assets William Dahab <i>Dahab & Associates</i>
2:40 - 3:10 PM	Capital Markets - Fixed Income Paul Lundmark <i>Richmond Capital Management</i>	Understanding Non-Traditional Assets Kerry Richardville <i>Mariner</i>	Behavioral Governance - Stewardship Don Trone <i>Center for Board Fiduciaries</i>
3:10 - 3:30 PM	Afternoon Refreshment Break		
3:30 - 4:30 PM	Basic Review	Intermediate Review	Advanced Review



CEU AGENDA
MONDAY
SEPTEMBER 23, 2024

General Session

7:50 - 8:00 AM

FPPTA Opening Comments
Peter C. Hapgood

1

8:00 - 10:00 AM

Lead Like a Bamboo Farmer
Greg Bell
Thought Leader, Business Consultant, Leadership Coach

2

10:00 - 10:30 AM

Morning Refreshment Break

Foundational Learning	Accelerated Learning	Exchange Learning
<div>10:30 - 11:00 AM</div> <div>Importance of COLA's for Pension Plans Jeffrey Amrose <i>Gabriel Roeder Smith & Company</i></div> <div>3</div>	<div></div> <div>Are Bonds in Fact Back ? Jordan Jackson <i>JP Morgan Asset Management</i></div> <div>9</div>	<div></div> <div>no session</div> <div>14</div>
<div>11:05 - 11:30 AM</div> <div>Custodians as Part of Responsible Pension Plan Management Vanessa Parrish <i>Amalgamated Bank</i></div> <div>4</div>	<div></div> <div>Rethinking Asset Allocation in the Decumulation Phase Sean McShea <i>SAGE Advisory Services</i></div> <div>10</div>	<div></div> <div>The Role of Defined Benefit Pensions in Recruiting & Retaining Public Safety Professionals Tyler Bond <i>National Institute on Retirement Security</i></div> <div></div>
<div>11:40- 12:10 PM</div> <div>Emerging Markets in Your Portfolio Natascha Williann <i>ABS Global Investments</i></div> <div>5</div>	<div></div> <div>Beyond the Dip: The Big-Picture Drivers for Continued Investment in Real Estate Sabrina Unger <i>American Realty Advisors</i></div> <div>11</div>	<div></div> <div>The Role of Defined Benefit Pensions in Recruiting & Retaining Public Safety Professionals Tyler Bond <i>National Institute on Retirement Security</i></div> <div>Sean McKinstry <i>FPPTA - Director of Research</i></div> <div>(60 minutes)</div> <div>15</div>

12:10 - 1:30 PM

Lunch Break

<div>1:30 - 2:00 PM</div> <div>The Case for Private Core Real Estate Benjamin Lathrop Alex Spotswood <i>Bailard Inc</i></div> <div>6</div>	<div></div> <div>Front End Focus: Opportunities in Short Duration Jeff Detwiler <i>Garcia Hamilton & Associates</i></div> <div>12</div>	<div></div> <div>no session</div>
<div>2:05 - 3:10 PM</div> <div>Roles & Responsibilities Related to Securities Litigation Brent Chudachek <i>Lorium Law, PLLC</i> Mark Rhein <i>Salem Trust Company</i> Adam Savett <i>Wolf Popper LLP</i></div> <div>(60 minutes)</div> <div>7</div>	<div></div> <div>Understanding Investment Benchmarks Aaron Lally <i>Meketa Investment Group</i> Greg White <i>Investment Perfomance Services, LLC</i></div> <div>(60 minutes)</div> <div>13</div>	<div></div> <div>Beneficiary Education Fred Nesbitt Dan Kleman <i>FPPTA Education Committee</i></div> <div>(60 minutes)</div> <div>16</div>

3:10 - 3:30 PM

Afternoon Break

3:30 - 4:30 PM

Present and Future Issues Facing DB Plans
Fred Nesbitt - FPPTA Ed Committee
Ron Ryan - Ryan ALM
Von Hughes - Morgan Stanley
Don Trone - The Center for Board Certified Fiduciaries

8

Having Your Voice Heard: Issues For Women in Male Dominated Field
Richelle Levy
FPPTA Education Committee

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CEU AGENDA
TUESDAY
SEPTEMBER 24, 2024

General Session

8:30 - 9:15 AM

The Global Economic Outlook
Jeffrey Schulze
ClearBridge Investments

1

9:15 - 10:10 AM

Public Pension Investment Overview
Burgess Chambers
Mitchell Brennan
BCA & Associates

2

10:10 - 10:30 AM

Morning Refreshment Break

Foundational Learning	Accelerated Learning	Exchange Learning
<div>10:30 - 11:00 AM</div> <div>Pensionomic State Data 2023 Tyler Bond <i>National Institute on Retirement Security</i></div> <div>3</div>	<div></div> <div>The Art of Private Equity Co-investing Champ Raju <i>PPM America Capital Partners</i></div> <div>8</div>	<div></div> <div>Asset Allocation Round Table Geoff Gerber <i>Twin Capital Management</i> Andrew O'Sullivan <i>Highland Capital Management</i> Nate Rusbosin <i>DRZ</i> Jeffrey Schulze <i>ClearBridge Investments</i></div> <div>(60 minutes)</div> <div>12</div>
<div>11:05 - 12:05 PM</div> <div>Understanding Actuarial Valuations and their Impact Sara Carlson <i>Foster & Foster Consulting</i></div> <div>(60 minutes)</div> <div>4</div>	<div></div> <div>Disability Case Study Pedro Herrara <i>Sugarman Susskind Braswell & Herrara</i></div> <div>(60 minutes)</div> <div>9</div>	<div></div> <div>no session</div>

12:10 - 1:30 PM

Lunch Break

<div>1:30 - 2:00 PM</div> <div>Passive-Aggressive Investing: The Hidden Risks of Indexing Anthony Brooks <i>Sawgrass Asset Management</i></div> <div>5</div>	<div></div> <div>The World's Most Strategic Component: A Semiconductor Chip Alex Torrens Gustavo Bikkesbakker Walter Scott</div> <div>10</div>	<div></div> <div>Actuarial Reports & Studies Round Table Kevin Spanier Gallagher Eric Atwater AON Chad Little <i>Freiman Little Actuaries</i> Pete Strong <i>Gabriel Roeder Smith</i></div> <div>(60 minutes)</div> <div>13</div>
<div>2:05 - 2:35 PM</div> <div>Behaviorial Finance Dan Bakalarz <i>Unison Asset Management</i></div> <div>6</div>	<div></div> <div>Where There's Smoke an Inside Look into The Investigations Behind the Largest Financial Scandal Maya Saxena <i>Saxena White</i> Hannah Ross <i>Bernstein Litowitz Berger & Grossman</i></div> <div>(60 minutes)</div> <div>11</div>	<div></div> <div>no Session</div>
<div>2:40 - 3:10 PM</div> <div>Alternative Income Strategies Michael Lucci <i>Bloomfield Capital</i></div> <div>7</div>		

3:10 - 3:30 PM

Afternoon Break

3:30 - 4:30 PM

FPPTA Legal Panel
Ken Harrison - Sugarman & Susskind
Ron Cohen - Lorium Law
Brent Chudachek - Lorium Law
Bonni Jensen - Klausner, Kauffman, Jensen & Levinson, PA

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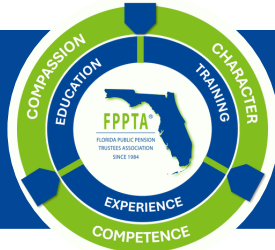
CPPT AGENDA

WEDNESDAY

SEPTEMBER 25, 2024

8:00 - 10:00
AM

Testing



CEU AGENDA

WEDNESDAY

SEPTEMBER 25, 2024

Attendance Check-in must be completed at the end of the session at 10:00 AM.

8:45 - 8:50
AM

Opening Remarks

1

8:50 - 9:00
AM

Communication Survey Results
Terri Sjodin

Sjodin Communications

2

9:00 - 10:00
AM

Diagnosis & Treatment of PTSD
Dr. Bryan T. Reuther

Reuther Psychological and Consultation Services, PLLC

3

What is PTSD?

Posttraumatic stress disorder (PTSD) is a mental health problem. PTSD can only develop after a person experiences or witnesses a life-threatening event. It is natural to feel afraid during and after a traumatic situation. Fear is a part of the body's "fight-or-flight" response, which helps us avoid or respond to potential danger. People may experience a range of reactions after trauma, and most people recover from initial symptoms over time. Those who continue to experience problems may be diagnosed with PTSD.

In this session, Dr. Reuther will review the history of PTSD and discuss how prevalent it is in first-responder populations. He will then define what a traumatic event is and cover the diagnostic criteria of PTSD according to the Diagnostic Manual of Mental Disorders, 5th edition text revision (DSM-5-TR). Dr. Reuther will explain how a comprehensive PTSD assessment is conducted and discuss how PTSD is treated.



Dr. Bryan T. Reuther

*Don't miss the follow-up Q&A virtual session on October 9 @ 2pm!
watch your inbox for more details!*

Education Program Committee

The Education Committee was established by then CEO Ray Edmondson back in 1996. His vision regarding trustee education was trend setting. With a handful of trustee and associate members, Ray asked for their professional perspective and experience to help create the best agenda possible for the two FPPTA Schools and conference held each year. The FPPTA established the first municipal trustee certification program in the United States. The tradition has continued. At this trustee school, the FPPTA has now launched its new Trustee Leadership Council (TLC) certification program along with expanding its CPPT certification program. The FPPTA would like to thank all the volunteers past and present, who have served on this committee providing excellence in educating public pension trustees in the state of Florida.

CPPT Certification Program

Basic Team

Gequita Cowan
Norris Park
Anthony Xuereb
Steve Aspinall

Intermediate Team

Lynn Bernstein
Katie Byrne
Warren West

Advanced Team

Phyllis Shaw
Kerry Richardville
Matt Hettler

CEU Program

Fundamental Learning

Greg Butler
Pete Strong
Katie Hammond
Chris Spencer

Accelerated Learning

Dwight Mattingly
Stefanie Leverette
Ricki Levi
Kurt Vroman

Idea Exchange – Networking

Sean McKinstry
Fred Nesbitt
WO Bell
Paul O'Connell

TLC Certification Program

TLC Team

Peter Hapgood
Tim Nash
Joe Griffin
Russ Kamp
Debbie McCoy
Steve Roth
Toby Rabelo

Advisory Members

Pete Prior
Ken Harrison
Tim Olsen
Dan Kleman
Jerry Navarette