

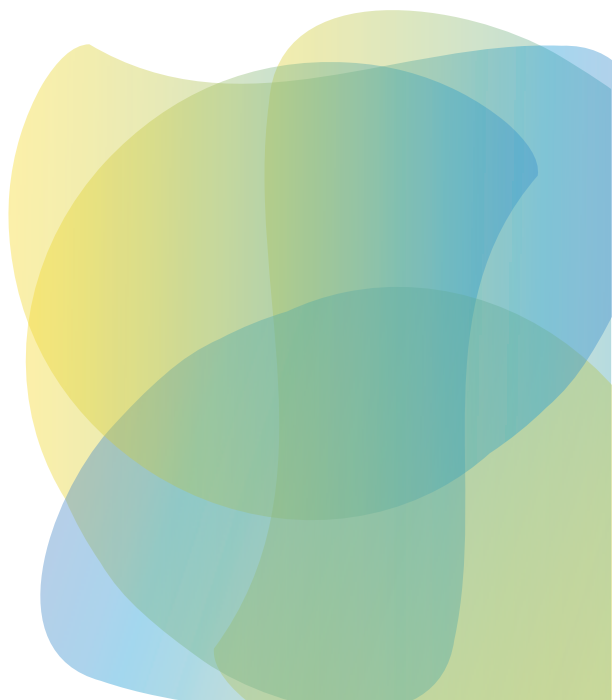


# Winter Trustee School Agenda

January 26 - 29, 2025

Renaissance Orlando at SeaWorld

*Shaping the Future - Trustee by Trustee*





# Schedule of Events

## Saturday, January 25, 2025

**2:00 pm** - Board of Directors Meeting - Meeting room Palani, 2nd floor

**All educational sessions take place in the Oceans Ballroom along with registration, breakfast and breaks. Welcome Gathering and Group Lunch are in Crystal Ballroom C, D, E.**

## Sunday, January 26th

**7:30 am – 8:30 am** - Breakfast for Orientation – Foyer of Oceans 12

**8:30 am – 3:30 pm** - Orientation for new members and members entering the CPPT program - Oceans 12

**1:30 pm – 5:00 pm** - TLC General Session - Labrid (2nd floor)

**2:00 pm – 3:30 pm** - Key Note Speaker, Greg Bell, Water the Bamboo - Oceans 12

**3:00 pm – 6:30 pm** - Event Registration - Ocean Foyer

**5:00 pm – 7:00 pm** - Welcome Gathering - Crystal Ballroom C, D, E

## Monday, January 27th

**6:50 am – 3:00 pm** - Event Registration – Oceans Foyer

**6:50 am – 3:00 pm** - Pick-Up Von Hughes, U.S. Public Pension Handbook (one copy per person)

**6:50 am – 3:00 pm** - Green Room for Speakers to review presentations – Oceans Foyer

**7:50 am – 10:00 am** - General Session – Key Note Speaker, Greg Bell, Don't Farm Alone (all attendees) – Oceans 5 – 8

**8:00 am - 10:00 am** - TLC program Begins - General Session – Labrid (2nd floor)

**10:30 am – 4:30 pm** - CPPT program and CEU program (see program agenda for schedule)

**4:30 pm – 11:00 pm** - Hospitality and Study Hall - Coral Ballroom

## Tuesday, January 28th

**7:30 am – 3:00 pm** - Event Registration – Oceans Foyer

**7:30 am – 3:00 pm** - Pick-Up Von Hughes, U.S. Public Pension Handbook (one copy per person)

**7:30 am – 3:00 pm** - Green Room for Speakers to review presentations – Oceans Foyer

**8:30 am – 4:30pm** - Educational Sessions

**8:30 am – 10:30 am** - TLC program - General Session – Labrid (2nd floor)

**12:10 pm – 1:30 pm** - Education Committee Luncheon - Palani (2nd floor)

**1:30 pm – 2:30 pm** - TLC Sponsorship Meeting - Labrid (2nd floor)

**4:30 pm – 11:00 pm** - Hospitality and Study Hall - Coral Ballroom

**4:30 pm – 6:00 pm** - TLC Sponsors Reception – Hinalea (2nd floor)

## Wednesday, January 29th

**8:00 am – 10:00 am** - CPPT Electronic Exams

**8:45 am – 10:00 am** - General Session – Key Note Speaker Dr. Bryan T. Reuther, Diagnosis & Treatment of PTSD



# Dear attendee,

At the Fall Trustee School, we introduced our new orientation program and enhancements to our CPPT program. We're happy to bring these enhancements back for the Winter Trustee School for those who are new or did not attend in the Fall. 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 the 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. In fact, anyone who has not seen Greg Bell's Water the Bamboo keynote address is encouraged to do so on Sunday afternoon.

## **CPPT Program Enhancement**

As trustees, it's important that you have a solid understanding of the design and functionality of defined benefit plans. 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 that 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 Priore*

CEO, Florida Public Pension Trustees Association







# Water The Bamboo Training Seminars



## *Future Schedule:*

### 2025

Monday – October 6th  
*'Bamboo Farmer  
Mindset'*

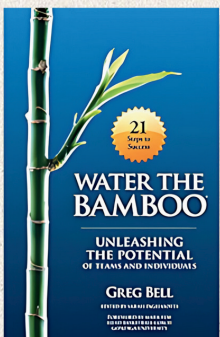
### 2026

Monday – February 2nd  
*'Adapt Like Bamboo'*

## 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 includes training sessions at our Trustee Schools through the Winter Trustee School of 2026. 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

JANUARY 26, 2025

Breakfast from 7:30 AM-8:30 AM  
(Foyer Oceans Ballroom 12)

**\*\* Check-in must be completed by 8:15 AM \*\***

	General Session	Oceans Ballroom 12
8:30 - 8:45 AM	<b>Welcome</b> <b>Kim Prior, CEO</b> Florida Public Pension Trustees Association	1
8:45 - 9:15 AM	<b>The Mission of the FPPTA</b> <b>Dwight Mattingly, Chairman</b> FPPTA Board of Directors	2
9:15 - 10:15 AM	<b>Shaping the Future - Trustee by Trustee</b> <b>FPPTA Education &amp; Resources</b> <b>Sean McKinstry</b> <b>Fred Nesbitt</b> Florida Public Pension Trustees Association	3
10:15 - 10:30 AM	Morning Break	Oceans 12 Foyer
10:30 - 11:15 AM	<b>The FPPTA Trustee Mentorship Program</b> <b>Gee Cowan &amp; Norris Park</b> FPPTA Education Committee	5
11:15 - 12:15 PM	<b>Capacity to Serve as Exemplary Leaders &amp; Stewards</b> <b>Don Trone</b> Center for Board Fiduciaries	6
12:15 - 1:15 PM	Lunch Break	Canaveral
1:15 - 2:00 PM	<b>The History of Public Pensions</b> <b>Adam Levinson</b> Klausner, Kauffman, Jensen & Levinson, PA	7
2:00 - 3:30 PM	<b>Water the Bamboo - Keynote Address</b> <b>Greg Bell</b> Thought Leader, Business Consultant, Leadership Coach	8



Download the  
FPPTA App!



**Wifi Name:** Renaissance\_conference  
**Password:** FPPTA2025



# CPPT AGENDA

MONDAY  
JANUARY 27, 2025

Breakfast from 6:50 AM-7:50 AM  
(Oceans Foyer)

**\*\* Check-in must be completed by 7:35 AM \*\***

	General Session			Oceans Ballroom 5-8
7:50 - 8:00 AM	<b>FPPTA Opening Comments</b> Kim Prior, CEO			1
8:00 - 10:00 AM	<b>Don't Farm Alone</b> Greg Bell <i>Thought Leader, Business Consultant, Leadership Coach</i>			2
10:00 - 10:30 AM	Morning Refreshment Break			Oceans Foyer
	Basic (Oceans 12)	Intermediate (Oceans 11)	Advanced (Oceans 10)	
10:30 - 11:00 AM	<b>Board Meeting Basics</b> Steve Corbet <i>FPPTA Education Committee</i>	<b>FPPTA Pension Plan Data Center</b> Fred Nesbitt, PhD <i>FPPTA Education Committee</i>	<b>Review of Risk &amp; Volatility</b> Steve Roth, CPPT <i>Dahab &amp; Associates</i>	3, 10, 15
11:05 - 11:35 AM	<b>Behavioral Governance - Decision Making</b> Don Trone <i>Center For Board Fiduciaries</i>	<b>Chapter 112 - 175 - 185</b> Adam Levinson <i>Klausner, Kaufman, Jensen, &amp; Levinson, PA</i>	<b>Fixed Income Markets</b> Jeff Detwiler <i>Garcia Hamilton &amp; Associates</i>	4, 16
11:40 - 12:10 PM	<b>The Custodian</b> Mark Rhein <i>Salem Trust Company</i>	(60 minutes)	<b>Capital Markets - Equity</b> Geoff Gerber <i>Twin Capital Management</i>	5, 11, 17
12:10 - 1:30 PM	Lunch Break			Crystal Ballroom C,D,E
1:30 - 2:00 PM	<b>The Administrator</b> Scott Baur <i>Resource Centers</i>	<b>Investment Consultant/ Manager Search</b> Scott Owens <i>Graystone Consulting</i>	<b>Private Equity</b> Rob Hatch <i>Constitution Capital Partners</i>	6, 12, 18
2:05 - 2:35 PM	<b>The Actuary</b> Eric Atwater <i>Aon</i>	<b>Advancing Ethics &amp; Professionalism</b> Caroline Klancke <i>Florida Ethics Institute</i>	<b>Private Debt</b> Laura Stolfi <i>Nuveen</i>	7, 13, 19
2:40 - 3:10 PM	<b>The Investment Consultant</b> Tyler Grumbles <i>Mariner</i>	(60 minutes)	<b>Modifications of Pension Plans</b> Mark Floyd <i>Mierzwa &amp; Floyd, P.A.</i>	8, 14, 20
3:10 - 3:30 PM	Afternoon Break			Oceans Foyer
3:30 - 4:30 PM	<b>Basic Review</b> Norris Park Anthony Xuereb Steve Aspinall	<b>Intermediate Review</b> Lynn Bernstein Katie Byrne Warren West	<b>Advanced Review</b> Stefanie Leverette Kerry Richardville Matt Hettler	9, 14, 21
4:30 - 11:00 PM	Hospitality and Study Hall			Coral Ballroom





# CPPT AGENDA

TUESDAY  
JANUARY 28, 2025

Breakfast from 7:30 AM – 8:30 AM  
(Oceans Foyer)

**\*\* Check-in must be completed by 8:15 AM \*\***

	Basic (Oceans 12)	Intermediate (Oceans 11)	Advanced (Oceans 10)
8:30 - 9:00 AM	<b>Ethics in Action</b> Kenneth Harrison <i>Sugarman &amp; Susskind</i>	<b>Equity Managers Meeting Report</b> Megan Anderson <i>Nuveen</i> 10	<b>Disability Process</b> Pedro Herrera <i>Sugarman &amp; Susskind</i>
9:05 - 9:35 AM	<b>Caroline Klancke</b> <i>Florida Ethics Institute</i>  (60 minutes) 1	<b>The Fixed Income Manager Report</b> Ryon Acey <i>Agincourt Capital Management</i> 11	(60 minutes) 20
9:40 - 10:10 AM	<b>The Attorney</b> Ricki Levy <i>Lorium Law</i> 2	<b>The Actuarial Report</b> Sara Carlson <i>Foster &amp; Foster Consulting</i> 12	<b>Establishing a Funding Policy</b> Pete Strong <i>Gabriel Roeder &amp; Smith</i> 21
10:10 - 10:30 AM	<b>Morning Refreshment Break</b> <i>Oceans Foyer</i>		
10:30 - 11:00 AM	<b>The Role of an Investment Manager</b> Anthony Xuereb <i>Polen Capital Management</i> 3	<b>Investment Consultant/ Asset Allocation</b> Mitchell Brennan <i>BCA, Inc</i> 13	<b>Impact of Changing Actuarial Assumptions</b> Chad Little <i>Freiman Little Actuaries</i> 22
11:05 - 11:35 AM	<b>The Importance of Diversification</b> Jason Turner <i>Great Lakes Advisors</i> 4	<b>Real Estate Performance Report</b> Deb Schwartz <i>Barings</i> 14	<b>Ethics Master Class</b> Caroline Klancke <i>Florida Ethics Institute</i>  (60 minutes) 23
11:40 - 12:10 PM	<b>Investment &amp; Economic Cycles</b> Kerry Richardville <i>Mariner</i> 5	<b>Investment Consultant Report</b> Scott Owens <i>Graystone Consulting</i> 15	
12:10 - 1:30 PM	<i>Ed Committee Luncheon - Palani</i>	<b>Lunch Break</b>	<i>Crystal Ballroom C,D,E</i>
1:30 - 2:00 PM	<b>Introduction to Real Estate</b> Tim Nash <i>Intercontinental Real Estate</i> 6	<b>Behavioral Governance - Leadership</b> Don Trone <i>Center for Board Fiduciaries</i> 16	<b>Emerging Markets</b> Kurt Wood <i>DRZ</i> 24
2:05 - 2:35 PM	<b>Equity Markets</b> Brad Penter <i>Callan, LLC</i> 7	<b>Rebalancing Your Portfolio</b> Aaron Lally <i>Meketa Investment Group</i> 17	<b>Real Assets</b> William Dahab <i>Dahab &amp; Associates</i> 25
2:40 - 3:10 PM	<b>Capital Markets - Fixed Income</b> Paul Lundmark <i>Richmond Capital Management</i> 8	<b>Understanding Non-Traditional Assets</b> Beth Bowen <i>Asset Consulting Group</i> 18	<b>Behavioral Governance - Stewardship</b> Don Trone <i>Center for Board Fiduciaries</i> 26
3:10 - 3:30 PM	<b>Afternoon Break</b> <i>Oceans Foyer</i>		
3:30 - 4:30 PM	<b>Basic Review</b> 9	<b>Intermediate Review</b> 19	<b>Advanced Review</b> 27
4:30 - 11:00 PM	<b>Hospitality and Study Hall</b> <i>Coral Ballroom</i>		



# CEU AGENDA

**MONDAY**  
JANUARY 27, 2025

Breakfast from 6:50 AM-7:50 AM  
(Oceans Foyer)

**\*\* Check-in must be completed by 7:35 AM \*\***

## General Session

Oceans 5-8

7:50 - 8:00 AM

**FPPTA - Opening Comments**  
Kim Prior, CEO

8:00 - 10:00 AM

**Don't Farm Alone**  
Greg Bell  
*Thought Leader, Business Consultant, Leadership Coach*

10:00 - 10:30 AM

## Morning Refreshment Break

Oceans Foyer

**Foundational Learning**  
*(Oceans 4)*

**Accelerated Learning**  
*(Oceans 3)*

**Exchange Learning**  
*(Oceans 2)*

Limited to the first 40 CPPT certified trustees.

10:30 - 11:00 AM

**Pensionomics Florida State Data 2025**  
Tyler Bond  
*National Institute on Retirement Security*

**The Art of Private Equity Co-Investing**  
Champ Raju  
*PPM America Capital Partners*

**Understanding Private Markets**  
Kerry Richardville - Moderator  
*Mariner*

11:05 - 11:35 AM

**Importance of COLA's for Pension Plans**  
Jeffrey Amrose  
*Gabriel Roeder Smith & Company*

**Election Impact on the U.S. Equities Market**  
Maria Katsileros  
*Aristotle Capital Management*

**Robert Hatch**  
*Constitution Capital Partners*  
**Laura Stolfi**  
*Nuveen*  
**Leanne Schmitt**  
*Star Mountain Capital*  
(60 minutes)

11:40 - 12:10 PM

**Emerging Markets in your Portfolio**  
Natascha Willians  
*ABS Global Investments*

**AI, Big Data, Cybersecurity**  
**Why Tech? Why Now?**  
Dave Smith  
*Bailard, Inc*

**No Session**

12:10 - 1:30 PM

## Lunch Break

Crystal Ballroom C,D,E

1:30 - 2:00 PM

**Passive-Aggressive Investing: The Hidden Risks of Indexing**  
Liridon Gila  
*Sawgrass Asset Management*

**Accessing the Emerging Markets Opportunity in Today's Environment**  
Natascha Willians  
*ABS Global Investments*

**Public Pension & Financial Markets**  
Sean McKinstry - Moderator  
*FPPTA Education Committee*

2:05 - 3:10 PM

**Roles & Responsibilities Related to Securities Litigation**  
Brent Chudachek  
*Lorium Law*  
Mark Rhein  
*Salem Trust Company*  
Adam Savett  
*Wolf Popper LLP*  
Kurt Vroman  
*Deltona Firefighters Pension Fund*  
(60 minutes)

**Understanding Investment Benchmarks**  
Beth Bowen  
*Asset Consulting Group*  
(60 minutes)

*National Institute on Retirement Security*  
**Katie Comstock**  
*Aon*  
(60 minutes)

3:10 - 3:30 PM

## Afternoon Break

Oceans Foyer

3:30 - 4:30 PM

**General Session**  
**Social Security Update**  
Kurt Czarnowski  
*Czarnowski Consulting*

Oceans 5-8

4:30 - 11:00 PM

## Hospitality and Study Hall

Coral Ballroom





# CEU AGENDA

TUESDAY

JANUARY 28, 2025

Breakfast from 7:30 AM – 8:30 AM  
(Oceans Foyer)

**\*\* Check-in must be completed by 8:15 AM \*\***

	<b>General Session</b>			<i>Oceans 5-8</i>
8:30 - 9:15 AM	<b>Election Implications for U.S. Equities</b> <b>Jeffrey Schulze</b> Clearbridge Investments			
9:15 - 10:10 AM	<b>Supply Chain Dynamics - The Reshaping of Global Trade</b> <b>Kurt Wood</b> DRZ			
10:10 - 10:30 AM	<b>Morning Refreshment Break</b>			<i>Oceans Foyer</i>
	<b>Foundational Learning</b> (Oceans 4)	<b>Accelerated Learning</b> (Oceans 3)	<b>Exchange Learning</b> (Oceans 2)	
			<i>Limited to the first 40 CPPT certified trustees.</i>	
10:30 - 11:00 AM	<b>Balancing Risk in the Uneven Interest Rate Environment</b> <b>Brian Elliott</b> Genter Capital Management	<b>Global Infrastructure &amp; National Resources</b> <b>Brian Blongastainer</b> Newton Investment Management	<b>The Present &amp; Future Outlook in the Bond Market</b> <b>Dave West - Moderator</b> Mariner <b>Daniel Carter</b> Fort Washington Investment Advisors <b>Jeff Detwiler</b> Garcia Hamilton & Associates <b>Chris Caputo</b> Integrity Fixed Income Management (60 minutes)	
11:05 - 11:35 AM	<b>Understanding Actuarial Valuations and Their Impact</b> <b>Sara Carlson</b> Foster-Foster Consulting (60 minutes)	<b>Disability Case Study</b> <b>Pedro Herrera</b> Sugarman Susskind Braswell & Herrera (60 minutes)		
11:40 - 12:10 PM			<b>No Session</b>	
12:10 - 1:30 PM	<i>Ed Committee Luncheon - Palani</i>	<b>Lunch Break</b>	<i>Crystal Ballroom C,D,E</i>	
1:30 - 2:00 PM	<b>Understanding Infrastructure</b> <b>Brian Collet</b> I Squared	<b>The Impact of U.S. Tariffs on China and the Emerging Market Countries</b> <b>Marc Miller</b> DRZ	<b>Key Resources for Pension Plan Funding</b> <b>Fred Nesbitt - Moderator</b> FPPTA Education Committee <b>Dave West</b> Mariner <b>Pete Strong</b> Gabriel Roeder Smith & Company (60 minutes)	
2:05 - 2:35 PM	<b>Understanding the Stock Market and Exchanges</b> <b>Steve Stack</b> Highland Capital Management, LLC	<b>The Real Estate Rebound</b> <b>Kevin White</b> DWS Asset Management		
2:40 - 3:10 PM	<b>Securities Litigation - Portfolio Monitoring</b> <b>Andrea Farah</b> Lowey Dannenberg P.C.	<b>U.S. Farmland's Purpose in Institutional Portfolios</b> <b>David Martin</b> U.S. Agriculture, LLC	<b>No Session</b>	
3:10 - 3:30 PM	<b>Afternoon Break</b>			<i>Oceans Foyer</i>
	<b>General Session</b>			<i>Oceans 5-8</i>
3:30 - 4:30 PM	<b>FPPTA Legal Panel</b> <b>Ken Harrison - Moderator</b> (FPPTA Education Committee) <b>Ron Cohen</b> (Lorium Law) <b>Pedro Herrera</b> (Sugarman Susskind Braswell & Herrera) <b>Bonni Jensen</b> (Klausner, Kauffman, Jensen, Levinson)			
4:30 - 11:00 PM	<b>Hospitality and Study Hall</b>			<i>Coral Ballroom</i>



# CPPT AGENDA

WEDNESDAY  
JANUARY 29, 2025

Breakfast 7:00 – 8:45 AM  
(Oceans Foyer)

8:00 - 10:00 AM

### Electronic CPPT Testing

(Participants are expected to bring a wifi capable device to their exam)



# CEU AGENDA

WEDNESDAY  
JANUARY 29, 2025

Breakfast 7:00 – 8:45 AM  
(Oceans Foyer)

**\*\* Check-in must be completed by 8:30 AM \*\***

## General Session

Oceans 5-8

8:45 - 9:00 AM

### FPPTA Update Kim Prior, CEO

9:00 - 10:00 AM

### Diagnosis & Treatment of PTSD Dr. Bryan T. Reuther

Reuther Psychological and Consultation Services, PLLC



**Dr. Bryan T. Reuther**

## What is PTSD?

Post-traumatic 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.

**Don't miss the follow up Q&A virtual session on February 12th at 2:00 PM.**





# TLC AGENDA

SUNDAY

JANUARY 26, 2025

Labrid (2nd floor)

**\*\* Check-in must be completed by 1:15 PM\*\***

1:30 - 1:45 PM	<b>Welcome to TLC Level 2</b> Peter C. Haggood - FPPTA Director of Education
1:45 - 2:15 PM	<b>Introduction to the FPPTA Bot</b> Don Trone - FPPTA Education Committee
2:15 - 2:30 PM	<b>Pension Formula Component - " C "</b> Russ Kamp - FPPTA Education Committee
2:30 - 2:45 PM	<b>Pension Formula Component - " I "</b> Steve Roth - FPPTA Education Committee
2:45 - 3:00 PM	<b>Pension Formula Component - " B "</b> Joe Griffin - FPPTA Education Committee
3:00 - 3:15 PM	<b>Pension Formula Component - " E "</b> Toby Rabelo - FPPTA Education Committee
3:15 - 4:15 PM	<b>TLC Team Meetings - Pension Formula</b> Knowledge Objectives Team Nash - The Pension Panthers - Team Trifecta
4:15 - 5:00 PM	<b>TLC General Session - Pension Formula</b> TLC Team vs FPPTA Bot Don Trone - FPPTA Education Committee



# TLC AGENDA

MONDAY

JANUARY 27, 2025

Labrid (2nd floor)

Breakfast from 6:50 AM-7:50 AM  
(Oceans Foyer)

**\*\* Check-in must be completed by 7:45 AM \*\***

8:00 - 10:00 AM	<b>TLC Case Study - Palm Tran - ATU 1577</b> Dwight Mattingly, Chairman Chad Little, Actuary
10:00 - 10:15 AM	<b>Morning Refreshment Break</b> <span style="float: right;">Hinalea (2nd floor)</span>
10:15 - 12:00 PM	<b>TLC Team Meetings - Cook County Case Study</b> Introduction to the Case Study Team Nash - The Pension Panthers - Team Trifecta
12:10 - 1:30 PM	<b>Lunch Break</b> <span style="float: right;">Crystal Ballroom D,C,E</span>
1:30 - 3:15 PM	<b>Cook County Case Study - Session 1</b> Asset Allocation - Impact of Risk on Return Geoff Gerber - FPPTA Education Committee
3:15 - 3:30 PM	<b>Afternoon Break</b> <span style="float: right;">Hinalea (2nd floor)</span>
3:30 - 5:00 PM	<b>Cook County Case Study - Session 2</b> Intro to Case Exhibits - Spreadsheets & Questions Geoff Gerber - FPPTA Education Committee



Labrid (2nd floor)

# TLC AGENDA

TUESDAY  
JANUARY 28, 2025

Breakfast from 7:30 AM – 8:30 AM  
(Oceans Foyer)

**\*\* Check-in must be completed by 8:15 AM \*\***

8:30 - 10:30 AM	<b>Cook County Case Study - Session 3</b> Alternative Investments Within the Asset Allocation Geoff Gerber - FPPTA Education Committee	
10:30 - 10:45 AM	<b>Morning Refreshment Break</b>	Hinalea (2nd floor)
10:45 - 12:00 PM	<b>Cook County Case Study - Session 4</b> What Decision did Cook County Make in 2017 Geoff Gerber - FPPTA Education Committee	
12:10 - 1:30 PM	<i>Ed Committee Luncheon - Palani</i>	<b>Lunch Break</b> Crystal Ballroom D,C,E
1:30 - 3:15 PM	<b>TLC Team Meetings - Cook County Case Study</b> Case Study Questions Team Nash - The Pension Panthers - Team Trifecta	
3:15 - 3:30 PM	<b>Afternoon Break</b>	Hinalea (2nd floor)
3:30 - 4:30 PM	<b>Cook County Case Study - Session 5</b> Group Discussion of Case Study Questions Geoff Gerber - FPPTA Education Committee	
4:30 - 6:00 PM	<b>TLC Sponsor's Reception</b>	Hinalea (2nd floor)

## Thanks to our TLC Platinum Sponsors!







## Checking in and out

Please don't forget that you must check in before the first session of each day, after lunch, and at the end of the last session of the day. This will ensure that you receive the appropriate CEU credits and, if requested, we have a record of your attendance.

## General Information

**FPPTA Attendance Policy:** We ask all attendees to check-in first thing each morning 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 outside of every room. Daily check-in and check-out was implemented to preserve the integrity of the program, 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](mailto:peterhapgood@fppta.org) or Sean McKinstry, FPPTA Assistant Director of Education at [SeanMcKinstry@fppta.org](mailto:SeanMcKinstry@fppta.org).

**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 are provided for educational purposes only. The information is provided "as is" without warranty of any kind.



# 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 last year's fall school, we launched the 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  
Stefanie Leverette

## CEU Program

### Fundamental Learning

Greg Butler  
Pete Strong  
Katie Hammond  
Chris Spencer

### Accelerated Learning

Dwight Mattingly  
Brian Devine  
Ricki Levy  
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  
Geoff Gerber

### Advisory Members

Pete Prior  
Ken Harrison  
Tim Olsen  
Dan Kleman  
Jerry Navarette



# Upcoming Virtual Training Events



**What Is PTSD? Virtual Discussion and Q&A**  
**Dr. Bryan T. Reuther**  
**February 12th at 2:00PM**

A follow-up discussion and Q&A following Dr. Reuther's keynote address at the Winter Trustee School. Bryan's lecture at the trustee school will review the history of PTSD and discuss how prevalent it is in first-responder populations, and how diagnosis is determined. This follow-up virtual meeting will allow trustees an opportunity to further explore and ask questions regarding PTSD.



**Financial Disclosure Requirements Applicable to Trustees**  
**Caroline Klancke,**  
**Executive Director of the Florida Ethics Institute**  
**April 18th at 2:00PM**

The FPPTA is pleased to host Caroline Klancke, Executive Director of the Florida Ethics Institute, to give a virtual presentation about financial disclosure rules for trustees with a Q&A following the presentation.

The financial disclosure requirements applicable to trustees changed in 2024 and affected all Form 1, "Statement of Financial Interests," filers. The FPPTA will be holding virtual training sessions addressing these changes on April 18, 2025 to assist FPPTA members with the transition from paper to electronic forms.





## Upcoming Events

### 41st Annual Conference

June 22 - 25, 2025

Omni Orlando Resort  
at Champions Gate

### Trustee School

October 5 - 8, 2025

Sawgrass Marriott Golf  
Resort & Spa

### Trustee School

February 1 - 4, 2026

Rosen Centre



## 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 Manager

brenda@fppta.org



### Candice Lee

Graphic Designer

candice@fppta.org



## Consultants



### Peter Hapgood

Director of Education

peterhapgood@fppta.org



### Fred Nesbitt

Media

fnesbitt911@gmail.com



### Susan Marden

Public Relations

smard2@verizon.net



### Don Trone

Center for Board Fiduciaries

Education Advisor

Don@3ethos.com