

# 41<sup>st</sup>

# Annual Conference Agenda



Shaping the Future: Trends and Insights for Tomorrow



Omni Orlando Resort at ChampionsGate  
June 22 - June 25, 2025

# Schedule of Events

## Saturday

June 21, 2025

**2:00 - 5:00 PM**

Board of Directors Meeting  
*Royal Dublin*

## Sunday

June 22, 2025

**7:30 AM**

Annual Associate Charitable Golf Classic  
*Omni ChampionsGate Golf Course*

**12:00 - 5:00 PM**

Exhibitors Move In  
*National Ballroom*

**3:00 - 6:00 PM**

Event Registration  
*Rotunda*

**5:00 - 7:00 PM**

Exhibit Hall and Welcome Gathering  
6PM Raffle Drawing  
*National Ballroom*

## Monday

June 23, 2025

**7:00 - 8:00 AM**

Continental Breakfast  
Exhibit Hall  
*National Ballroom*

**8:00 - 9:30 AM**

Exhibit Hall Closed for Opening Ceremonies

**9:30 - 12:30 PM**

Board of Directors Election Booth Open

**10:45 - 11:45 AM**

Morning Refreshment Break  
Exhibit Hall  
*National Ballroom*

**12:45 - 2:15 PM**

Break for Lunch on your own  
Exhibit Hall Closed

**4:15 - 5:15 PM**

Afternoon Break & Raffle  
Exhibit Hall  
*National Ballroom*

**2:30 - 5:00 PM**

Board of Directors Election Booth Open

## Tuesday

June 24, 2025

**7:15 - 8:15 AM**

Continental Breakfast  
Exhibit Hall  
*National Ballroom*

**7:15 - 12:15 PM**

Board of Directors Election Booth Open

**10:30 - 11:30 AM**

Morning Refreshment Break  
Exhibit Hall  
*National Ballroom*

**12:30 - 2:00 PM**

Break for Lunch on your own  
Exhibit Hall Closed

**12:30 - 2:00 PM**

Board of Directors Meeting  
*Royal Dublin*

**3:15 PM**

Exhibit Hall Closed

**3:15 - 4:15 PM**

Annual Membership Meeting  
*International Ballroom*

**4:15 - 5:00 PM**

Refreshment Break & Raffle  
*International Ballroom*

## Name Badges

You and your guest must be registered with the FPPTA. You will not be permitted to enter 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 23, 2025**

7:15 - 3:00 PM - Registration - Rotunda

7:00 - 8:00 AM - Breakfast - National Ballroom

All Sessions Today will be in the *International Ballroom*



**Check-in by  
7:45 AM**

**8:00 - 9:30 AM**

### Opening Ceremonies

#### **State of the FPPTA**

**Kim Prior**, Chief Executive Officer

#### **Board of Directors Election**

**Ken Harrison**, Chairman of Election Committee

#### **Raymond T. Edmondson Service Awards**

**Kim Prior**, Chief Executive Officer

#### **RTE Scholarship Awards**

**Chris Spencer**, Chairman of the Scholarship Committee

#### **CPPT Awards**

**Kim Prior**, Chief Executive Officer

#### **TLC Awards**

**Peter Hapgood**, Senior Education Consultant

### **The Voice**

**David Keeling**

**9:30 - 9:45 AM**



### **Shaping the Future - Trends and Insights for Tomorrow**

**Sean McKinstry**

*FPPTA Director of Education*



### **The Power of Being Perfectly You**

**Mariana Atencio**

*Peabody Award Winning Journalist, Best Selling Author,  
Entrepreneur, Inspiring Storyteller and Host/Moderator*

It's a fact: People are at their best – at work and in life – when they feel like they can be themselves. They're more confident in the face of change and uncertainty, more engaged and resilient, and have a greater sense of purpose and well-being. But fear can sometimes keep us from being real. In this presentation, Mariana Atencio brings her energy, humor, and skillful storytelling to inspire people to embrace their authenticity and unleash the power that comes with being themselves. Being "Perfectly You" builds trust and connection – it attracts people like a magnet because authenticity stands out in a world of algorithms and A.I. content. Mariana's unique personal story and infectious optimism energizes people with the courage to fully engage, adapt to constant change, and reach new levels of fulfillment at work and in life.

**9:45 - 10:45 AM**

**10:45 - 11:45 AM**

**Morning Break - Exhibit Hall - National Ballroom**



# Monday Afternoon, June 23, 2025

7:00 - 3:00 PM - Registration - Rotunda

## Utilizing the Public Pension Formula - Trustee Leadership Council Panel

**Mariana Atencio** - Moderator

**Matt Harrelson**, Vero Beach Police

**Phyllis Shaw**, Hollywood General Employees

**Ernie Ramos**, North Miami General Employees

**Paul O'Connell**, Pompano Beach Fire & Police

This presentation breaks down a simple formula that shows how money comes into a pension plan—through things like contributions and investments—and how it goes out to pay retirees and cover costs. It helps explain why it's important to keep the money coming in equal to the money going out to keep the plan running smoothly.



11:45 - 12:45 PM

12:45 - 2:15 PM

## Lunch - On Your Own

✓  
Check-in by  
2:00PM

2:15 - 3:15 PM



## Futurenomics: The Economic Snapshot You Need to See Today

**Dr. Mary Kelly**

*Renowned Economist & Leadership Expert*

## Global Economy - Panel Discussion

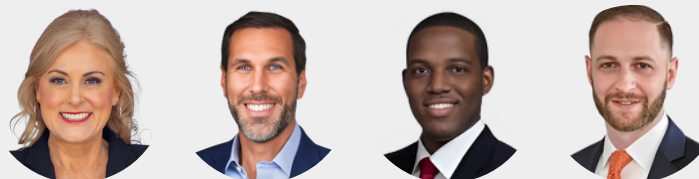
**Dr. Mary Kelly** - Moderator

**Jeff Klingelhofer**, Aristotle Capital

**Jordan Jackson**, JP Morgan Asset Management

**Josh Jamner**, Clearbridge Investments

Heightened economic uncertainty driven by global escalating trade tensions will impact everything from the cost of everyday consumer goods to market performance. This panel will investigate the rapidly changing landscape and what a reimagined global economy could look like and what it means for pension plans.



3:15 - 4:15 PM

✓  
Check-out by  
4:30 PM

4:15 PM

## Afternoon Break & Daily Raffle - Exhibit Hall National Ballroom





# Tuesday, June 24, 2025

7:00 - 3:00 PM - Registration - Rotunda

7:15 - 8:15 AM - Breakfast - National Ballroom

All Sessions Today will be in the International Ballroom



Check-in by  
8:00 AM

8:15 - 8:30 AM

## The Voice David Keeling



### Opening Announcements from FPPTA

**David West**

*FPPTA Director of Curriculum*

8:30 - 9:30 AM



### Market Signals: What the Financial Markets Are Telling Us Now

**Peter Ricchiuti**

*Tulane University Business School Professor  
CNN, CNBC, NYT & Barron's Contributor*

### Market Outlook Opportunities - Panel Discussion

**Peter Ricchiuti** - Moderator

**Geoff Gerber**, *Twin Capital Management*

**Marc Miller**, *DRZ Investment Advisors*

**Paul Nasser**, *Intercontinental Real Estate*

Driven by the changing economic landscape, pension funds will need to pivot to hedge volatility and risk while maintaining a steadfast strategy towards long-term solvency. This panel will discuss where opportunities exist in the markets to protect and grow investment returns for your fund.



9:30 - 10:30 AM

10:30 - 11:30 AM

**Morning Break** - Exhibit Hall

National Ballroom

### Short Term Market Volatility & Public Pension Plans

**Joe Griffin**, *FPPTA Education Committee - Moderator*

**Alex Brown**, *NASRA Research Manager*

**Sara Carlson**, *Foster & Foster Consulting Actuaries*

**Steve Roth**, *Dahab Associates*



11:30 - 12:30 PM



## Tuesday Afternoon, June 24, 2025

7:00 - 3:00 PM - Registration - Rotunda

12:30 - 2:00 PM

Lunch - On Your Own

International Ballroom



Check-in by  
1:45 PM

### Rest & Digest with Yin Yoga

**Sherril Cheevers**, *Saxena White*

**Meagan Johnson**, *ABS Global Investments*

Take a deep breath and give yourself permission to pause. Yin Yoga is your invitation to step out of the constant state of fight-or-flight and into a space of calm, safety, and deep restoration. Through long, gentle holds and mindful stillness, you'll signal to your nervous system that it's time to rest, digest, and heal. In a world that moves fast, come slow down—and come home to yourself.



2:00 - 2:15 PM

### Introducing the FPPTA Bot

**Don Trone**

*FPPTA Education Consultant*



The FPPTA continues to develop resources and technologies to assist trustees in their role as stewards of their fund. The FPPTA Chat Bot will provide trustees a tool to give real time answers to your pension-related questions anywhere, any time. FPPTA Education Consultant, Don Trone, will provide an overview and demonstration of the new FPPTA Chat Bot set for launch in 2026.

2:15 - 2:30 PM

### Exploring the AI Frontier

#### Demystifying a Rapidly Changing Landscape

**Matthew Bertram**

*CTO, Entrepreneur, Consultant*



In a thought-provoking and inspiring presentation, Matthew shares a framework to comprehend the AI transformation and its formidable impact on every industry. He provides many real-world examples of AI in business, including what it can make, what it can do, and how it is affecting both back office and field operations. You will gain inspiration with ideas on how to pilot your organization through a world that is evolving at unprecedented speeds.

2:30 - 3:30 PM



Check-out by  
3:45 PM

FPPTA Annual Membership Meeting

3:30 - 4:30 PM

Afternoon Break & Daily Raffle - Exhibit Hall  
National Ballroom

4:30 PM



**Wednesday, June 25, 2025**

7:45 - 8:45 AM - Breakfast - National Ballroom

International Ballroom

**The Voice**  
**David Keeling**

8:45 - 9:00 AM



**Opening Comments**  
**Kim Prior, CEO**

**Beyond Coping: How to Foster Resilience, Connection,  
and Happiness in the Workplace**



**Johnny Crowder**

*Founder and CEO of Cope Notes*

9:00 - 10:00 AM



**Check-out by  
10:15 AM**

Crippling burnout. Chronic absenteeism. Rampant resignations. The multi-headed monster of compassion fatigue, longer working days, and employee isolation are damming up the rivers of productivity at thousands of companies. Employers are concerned—and rightfully so.

Leveraging insights from his own lifelong mental health journey, Johnny Crowder shows audiences why talking about mental health should be as straightforward as talking about physical health, even in the workplace. In plain English, he shares the hard-won strategies for emotional wellbeing that led to the creation of his science-backed breakthrough mental and emotional support program, Cope Notes, which is now in use in nearly 100 countries around the world.