



Fall Trustee School Agenda

October 5th - 8th, 2025

Sawgrass Marriott Golf Resort and Spa





Schedule of Events

Your Schedule for this Fall Trustee School:

- Registration is at the *Masters Registration Desk*.
- CEU and CPPT breakfasts and breaks are in the *Champions Ballroom Foyer*.
- TLC breakfasts and breaks are in *Masters Ballroom D*
- Lunches on Monday and Tuesday are held in the *Tournament Hall*.
- Welcome Gathering is in the *Champions Ballroom DE*.
- Hospitality Room & Study Hall are in the *Tournament Hall A*.

Saturday, October 4th, 2025

2:00 pm - Board of Directors Meeting - *Masters Ballroom D*

Sunday, October 5th, 2025

7:45 am – 8:45 am - Breakfast for Orientation – *Master Ballroom E*

8:45 am – 2:30 pm - Orientation and members entering the CPPT Program - *Masters Ballroom E*

12:00 pm - 1:00 pm - Lunch - *Champions Ballroom BC*

1:00 pm – 2:30 pm - Key Note Speaker, Greg Bell, Water the Bamboo - *Masters Ballroom E*

3:00 pm – 6:30 pm - Event Registration - *Masters Registration Desk*

5:00 pm – 7:00 pm - Welcome Gathering - *Champions Ballroom DE*

Monday, October 6th, 2025

6:50 am - 7:50 am - CPPT and CEU Breakfasts - *Champions Ballroom Foyer*

7:00 am - 8:00 am - TLC Breakfasts - *Masters Ballroom D*

7:00 pm - 3:00 pm - Event Registration – *Masters Registration Desk*

7:00 am – 3:00 pm - Green Room for Speakers to review presentations – *Players D*

7:00 am – 10:00 am - General Session – Key Note Speaker, Greg Bell, Bamboo Farmer Mindset
- *Champions Ballroom DE*

8:00 am - 10:00 am - TLC Program - General Session – *Masters Ballroom D*

10:30 am – 4:30 pm - Educational Sessions

4:30 pm – 11:00 pm - Hospitality and Study Hall - *Tournament Hall A*

Tuesday, October 7th, 2025

7:30 am - 8:30 am - CPPT and CEU Breakfast - *Champions Ballroom Foyer*

7:00 am - 8:00 am - TLC Breakfast - *Masters Ballroom D*

7:00 am – 3:00 pm - Event Registration – *Masters Registration Desk*

7:00 am – 3:00 pm - Green Room for Speakers to review presentations – *Players D*

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

8:30 am – 10:30 am - TLC Program - General Session – *Masters Ballroom D*

12:10 pm – 1:30 pm - Education Committee Luncheon - *Champions Ballroom A*

4:30 pm – 11:00 pm - Hospitality and Study Hall - *Tournament Hall A*

4:30 pm – 6:00 pm - TLC Sponsors Reception – *Players BC*

Wednesday, October 8th, 2025

7:00 am - 8:45 am - CPPT, CEU, and TLC Breakfast - *Champions Ballroom Foyer*

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

8:45 am – 10:15 am - General Session – Legal Panel - *Champions Ballroom DE*

8:00 am - 10:00 am - TLC Meetings - *Masters Ballroom D*

Dear attendee,

On behalf of the Board of Directors and the Education Committee, it is my pleasure to welcome you to the Fall Trustee School. We are excited to have you join us for several days of education, connection, and professional growth.

This year, we are pleased to continue the enhancements to our Certified Public Pension Trustee (CPPT) program. The new orientation, introduced at the Fall 2024 Trustee School, is designed to give first-time attendees and new trustees a strong foundation before entering the CPPT Basic classes. On Sunday, you'll have the opportunity to learn about FPPTA's mission, history, and the essential role trustees play in protecting Florida's retirement systems. We encourage all attendees, not just CPPT enrollees, to take part in this valuable orientation experience.

Throughout the week, you'll find a robust agenda designed to meet the needs of every trustee. In addition to the CPPT program, we are offering Continuing Education Unit (CEU) sessions as well as the Trustee Leadership Council (TLC). With so much to choose from, there is truly something for everyone. Please remember: if you are enrolled in CPPT, you must remain in the appropriate CPPT track, including TLC sessions. Unless you are enrolled in CPPT or TLC, you may attend any session of your choice, with the exception of TLC, which is reserved for its enrollees.

The CPPT curriculum continues to incorporate new modules on behavioral governance, ethics, and critical thinking, equipping trustees with the tools to navigate today's complex fiduciary landscape. Alongside this, the CEU sessions and TLC provide opportunities for continued learning and deeper exploration of advanced topics in pension governance and leadership.

We hope you will also take advantage of the many opportunities to connect with peers from across the state, exchange ideas, and strengthen the network of dedicated trustees who share your commitment to public service. Thank you for your participation and your dedication to serving Florida's public employees and retirees. We look forward to an engaging and productive Trustee School together.

Sincerely,

Kim Prior, CPPT, TLC

FPPTA Chief Executive Officer





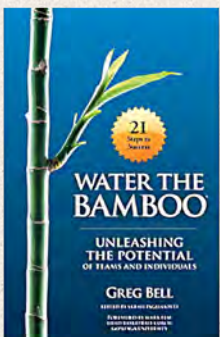
Water The Bamboo Training Seminars



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

OCTOBER 5TH, 2025

Breakfast from 7:45 AM-8:45 AM
Masters Ballroom E

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

	General Session	Masters Ballroom E
8:45 - 9:00 AM	Welcome Kim Prior, CEO <i>Florida Public Pension Trustees Association</i>	
9:00 - 9:15 AM	The Mission of the FPPTA Dwight Mattingly, Chairman <i>FPPTA Board of Directors</i>	
9:15 - 10:00 AM	Shaping the Future - Trustee by Trustee FPPTA Education & Resources Sean McKinstry <i>FPPTA Director of Education</i> Dave West <i>FPPTA Director of Curriculum</i>	
10:00 - 10:30 AM	Morning Break	Masters Ballroom E
10:30 - 11:15 AM	The FPPTA Trustee Mentorship Program Gee Cowan & Norris Park <i>FPPTA Education Committee</i>	
11:15 - 12:00 PM	The History of Public Pensions Adam Levinson <i>Klausner, Kauffman, Jensen & Levinson, PA</i>	
12:00 - 1:00 PM	Lunch Break	Champions Ballroom BC
1:00 - 2:30 PM	Water the Bamboo Greg Bell <i>Thought Leader, Business Consultant, Leadership Coach</i>	



Download the
FPPTA App!



Wifi Name: Marriott_Conference
Password: Fall2025



BASIC

MONDAY AND TUESDAY

OCTOBER 6TH AND 7TH, 2025

Breakfast from 6:50 AM – 7:50 AM
Champions Ballroom Foyer

Breakfast from 7:30 AM – 8:30 AM
Champions Ballroom Foyer

Monday

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

General Session– Champions Ballroom DE

7:50 – 8:00 AM

FPPTA Opening Comments
Kim Prior – CEO

8:00 – 10:00 AM

Bamboo Farmer Mindset
Greg Bell
Thought Leader, Business Consultant, Leadership Coach

10:00 – 10:30 AM

Morning Break *Champions Ballroom Foyer*

Basic Sessions – Masters Ballroom E

10:30 – 11:15 AM

Governance for Exemplary Leadership and Stewardship
Don Trone
Behavioral Governance Institute

11:20 – 12:10 PM

Overview of Trustee Ethics in Florida
Caroline Klancke, Florida Ethics Institute
Ken Harrison, Esq. FPPTA Director Emeritus

12:10 – 1:30 PM

Lunch Break *Tournament Hall*

1:30 – 2:30 PM

Fundamental Equation of Pension Plan Financing
Pension Formula: $C+I = B+E$
Sara Carlson
Foster & Foster Actuaries and Consultants

2:35 – 3:10 PM

Defined Benefit vs. Defined Contribution Pensions in Florida
Kevin Spanier
Gallagher

3:10 – 3:30 PM

Afternoon Break *Champions Ballroom Foyer*

3:30 – 4:30 PM

Foundational Economics for Public Pension Plan Trustees
Dr. Mary Kelly – Economist

4:30 – 11:00 PM

Hospitality and Study Hall

Tuesday

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

Basic Sessions – Masters Ballroom E

8:30 – 9:15 AM

Pre-Funding vs. Pay-as-you-Go Pension Plans
Eric Atwater
Aon

9:20 – 10:10 AM

Actuarial Valuations of Defined Benefit Plans
Kevin Spanier
Gallagher

10:10 – 10:30 AM

Morning Break *Champions Ballroom Foyer*

10:30 – 12:10 PM

Actuarial Alphabet Soup
Brad Armstrong, Peter Tramont & Piotr Krekora
Gabriel Roeder Smith

(90 minutes)

12:10 – 1:30 PM

Lunch Break *Tournament Hall*

1:30 – 3:05 PM

Funding Implications
Doug Lozen
Foster & Foster Actuaries and Consultants

(90 minutes)

3:10 – 3:30 PM

Afternoon Break *Champions Ballroom Foyer*

3:30 – 4:30 PM

Basic Program Review

Tournament Hall A



INTERMEDIATE

MONDAY AND TUESDAY

OCTOBER 6TH AND 7TH, 2025

Breakfast from 6:50 AM–7:50 AM
Champions Foyer

Breakfast from 7:30 AM – 8:30 AM
Champions Foyer

Monday

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

General Session– Champions Ballroom DE

7:50 – 8:00 AM

FPPTA Opening Comments
Kim Prior – CEO

8:00 – 10:00 AM

Bamboo Farmer Mindset
Greg Bell
Thought Leader, Business Consultant, Leadership Coach

10:00 – 10:30 AM

Morning Break *Champions Ballroom Foyer*

Intermediate Sessions – Heritage CDE

10:30 – 11:00 AM

Fundamental Equation of Pension Plan Financing
Pension Formula: $C+I = B+E$
Doug Lozen
Foster & Foster Actuaries and Consultants

11:05 – 12:10 PM

Chapter 112 – 175 – 185
Adam Levinson
Klausner, Kaufman, Jensen, & Levinson P.A.
(60 minutes)

12:10 – 1:30 PM

Lunch Break *Tournament Hall*

1:30 – 2:30 PM

Advancing Ethics & Professionalism
Caroline Klancke
Florida Ethics Institute
(60 minutes)

2:35 – 3:10 PM

Behavioral Governance – Leadership
Don Trone
Behavioral Governance Institute

3:10 – 3:30 PM

Afternoon Break *Champions Ballroom Foyer*

3:30 – 4:30 PM

Asset Allocation
Tyler Grumbles
Mariner

4:30 – 11:00 PM

Hospitality and Study Hall

Tuesday

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

Intermediate Sessions – Heritage CDE

8:30 – 9:00 AM

The Investment Manager Search Process
Scott Owens
Graystone Consulting

9:05 – 9:35 AM

Equity Managers Meeting Report
Megan Anderson
Nuveen

9:40 – 10:10 AM

Fixed Income Managers Report
Ryon Acey
Agincourt Capital Management

10:10 – 10:30 AM

Morning Break *Champions Ballroom Foyer*

10:30 – 11:00 AM

Real Estate Performance Report
Maya Packer
Barings

11:05 – 12:10 PM

The Actuarial Report
Sara Carlson
Foster & Foster Actuaries and Consultants

12:10 – 1:30 PM

Lunch Break *Tournament Hall*

1:30 – 2:00 PM

Rebalancing Your Portfolio
Aaron Lally & Shawn Bowen
Meketa Investment Group

2:05 – 2:35 PM

Understanding Non-Traditional Assets
Beth Bowen
Asset Consulting Group

2:40 – 3:10 PM

Understanding Wall Street
Dr. Mary Kelly

3:10 – 3:30 PM

Afternoon Break *Champions Ballroom Foyer*

3:30 – 4:30 PM

Intermediate Program Review

Tournament Hall A



ADVANCED MONDAY AND TUESDAY

OCTOBER 6TH AND 7TH, 2025

Breakfast from 6:50 AM–7:50 AM
Champions Foyer

Breakfast from 7:30 AM – 8:30 AM
Champions Foyer

Monday

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

General Session– Champions Ballroom DE

FPPTA Opening Comments
Kim Prior – CEO

Bamboo Farmer Mindset

Greg Bell

Thought Leader, Business Consultant, Leadership Coach

Morning Break

Champions Ballroom Foyer

Advanced Sessions – Heriatge AB

Fundamental Equation of Pension Plan Financing
Pension Formula: $C+I = B+E$

Steve Roth

Dahab & Associates

Asset Class Performance / Market Cycles

Dr. Mary Kelly

Economist

(60 minutes)

Lunch Break

Tournament Hall

Fixed Income Markets

Jeff Detwiler

Garcia Hamilton & Associates

Capital Markets – Equity

Geoff Gerber

Twin Capital Management

Risk & Volatility

Steve Roth

Dahab & Associates

Afternoon Break

Champions Ballroom Foyer

Trends in Real Estate

Sabrina Unger

American Realty Advisors

Private Debt

Laura Stolfi

Nuveen

Hospitality and Study Hall

Tuesday

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

Advanced Sessions – Heritage AB

Private Equity

Rob Hatch

Constitution Capital Partners

Disability Process

Pedro Herrera

Sugarman Susskind Braswell & Herrera

(60 minutes)

Morning Break

Champions Ballroom Foyer

Establishing a Funding Policy

Pete Strong

Gabriel Roeder Smith

Ethics Master Class

Caroline Klancke

Florida Ethics Institute

Lunch Break

Tournament Hall

Emerging Markets

Kurt Wood

DRZ Investment Advisors

Real Assets

David Lee

Dahab & Associates

Behavioral Governance

Don Trone

Behavioral Governance Institute

Afternoon Break

Champions Ballroom Foyer

Advanced Program Review

Tournament Hall A



CEU AGENDA

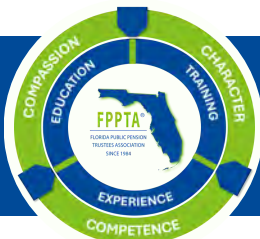
MONDAY

OCTOBER 6TH, 2025

Breakfast from 6:50 AM-7:50 AM
Champions Foyer

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

	General Session			Champions Ballroom DE
7:50 - 8:00 AM	FPPTA Opening Comments Kim Prior FPPTA - CEO			
8:00 - 10:00 AM	Bamboo Farmer Mindset Greg Bell <i>Thought Leader, Business Consultant, Leadership Coach</i>			
10:00 - 10:30 AM	Morning Refreshment Break			Champions Ballroom Foyer
	Foundational Learning	Accelerated Learning	Exchange Learning	
	Champions Ballroom BC	Champions Ballroom FG	Champions Ballroom H	
10:30 - 11:00 AM	Fundamental Equation of Pension Plan Funding Pension Formula: C+I = B+E Tim Nash FPPTA Education Committee	Fundamentals: Equation of Pension Plan Funding Pension Formula: C+I = B+E Russ Kamp FPPTA Education Committee	No Session	
11:05 - 11:35 AM	Four Stages of the Business Cycle Jaclyn Campis <i>Schroders</i>	Unintended Consequences of Index Investing Chris Greco <i>Waycross Partners</i>	No Session	
11:40 - 12:10 PM	Fixed Income: Risk Reducer or Income Generator Jeff Detwiler <i>Garcia Hamilton & Associates</i>	Emerging Markets in Your Portfolio Natascha Willans <i>ABS Global Investments</i>	No Session	
12:10 - 1:30 PM	Lunch Break			Tournament Hall
1:30 - 2:00 PM	Understanding the Stock Market & Exchanges Steve Stack <i>Highland Capital Management</i>	Why Investors Should Think Globally Gustavo Bikkesbakker <i>Walter Scott & Partners</i>	Liability Driven Investing Dave West FPPTA Director of Curriculum Russ Kamp Ryan ALM Sean McShea Sage Advisory Services (60 minutes)	
2:05 - 2:35 PM	From Giants to Gems: Anticipating the Small Cap Leadership Cycle Patrick Riley <i>Sawgrass Investment Management</i>	Private Equity Investing Beth Bowen <i>Asset Consulting Group</i> Eric Wilcomes <i>Taurus Private Markets</i> Alex Tatum <i>Constitution Capital Partners</i> (60 minutes)	No Session	
2:40- 3:10 PM	The Role of Self Storage in Pension Portfolios Bill Leitner <i>Leitbox Storage Partners</i>			
3:10 - 3:30 PM	Afternoon Break			Champions Ballroom Foyer
	General Session			Champions Ballroom DE
3:30 - 4:30 PM	Importance of COLAs for Pension Plans Dave West , FPPTA Director of Curriculum Doug Lozen , Foster & Foster Actuaries and Consultants Pete Strong , Gabriel Roeder Smith			
4:30 - 11:00 pm	Hospitality and Study Hall			Tournament Hall A



CEU AGENDA

TUESDAY

OCTOBER 7TH, 2025

Breakfast from 7:30 AM – 8:30 AM
Champions Ballroom Foyer

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

	General Session			Champions Ballroom DE
8:30 - 8:40 AM	FPPTA Opening Comments Sean McKinstry FPPTA Director of Education			
8:40 - 9:00 AM	Rest & Restore - Yin Yoga Sherril Cheevers - Saxena White Meagan Johnson - ABS Global Investment			
9:00 - 10:00 AM	Economic and GeoPolitical Update Dr. Mary Kelly - Economist			
10:00 - 10:30 AM	Morning Refreshment Break			Champions Ballroom Foyer
	Foundational Learning Champions Ballroom BC	Accelerated Learning Champions Ballroom FG	Exchange Learning Champions Ballroom H	
10:30 - 11:35 AM	Let's Talk About Drop Plans Eric Atwater Aon (60 minutes)	Private Credit / Debt Kerry Richardville Mariner Laura Stolfi Nuveen Ryan Lynch Golub Capital Leanne Schmitt Star Mountain Capital (60 minutes)	No Session	
11:40 - 12:10 PM	Best Practices to Avoid Fraud Mark Rhein Salem Trust	Small Cap Equities - When Will They Come Back? Kurt Wood DRZ Investment Advisors	No Session	
12:10 - 1:30 PM	Lunch Break			Tournament Hall
1:30 - 2:00 PM	Around the Horn - Equity & Fixed Income Performance Update Brad Penter Callan, LLC David Jackson Richmond Capital Management Jason Turner Great Lakes Advisors (60 minutes)	Will U.S. Government Credit Continue to Be the Place to Be? Brian Elliott Genter Capital Management Private Real Estate Market Update Frank Wan BCA, Inc Sabrina Unger American Realty Advisors Alex Spotswood Bailard, Inc Tim Nash Intercontinental Real Estate (60 minutes)	Best Practices for Pension Administration Dwight Mattingly FPPTA Education Committee Todd Flessner CBIZ J Scott Baur Resource Centers LLC (60 minutes)	
2:05 - 2:35 PM				
2:40 - 3:10 PM	Portfolio Monitoring Andrea Farah Lowey Dannenberg P.C.		No Session	
3:10 - 3:30 PM	Afternoon Break			Champions Ballroom Foyer
	General Session			Champions Ballroom DE
3:30 - 4:30 PM	Eliminating Florida Property Taxes Dwight Mattingly FPPTA Senior Education Consultant Paul O'Connell FPPTA Education Committee Casey Cook Florida League of Cities			
4:30 - 11:00 PM	Hospitality and Study Hall			Tournament Hall A



TLC AGENDA

MONDAY

Breakfast from 7:00 AM-8:00 AM
Masters Ballroom D

Masters Ballroom D

OCTOBER 6TH, 2025

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

8:00 - 8:30 AM

Welcome to the Trustee Leadership Council
Peter C. Hapgood - FPPTA Senior Education Consultant

8:30 - 10:00 AM

Introduction to the FPPTA BOT
Don Trone - FPPTA Education Consultant

10:00 - 10:30 AM

Morning Refreshment Break

Masters Ballroom D

10:30 - 12:00 PM

The FPPTA Education BluePrint - The Pension Formula
Debbie McCoy & Toby Rabelo- FPPTA Education Committee
Matt Harrelson - Vero Beach Police Officers' Pension Fund
Phyllis Shaw - Hollywood Employees' Retirement Fund
Ernie Ramos - North Miami General Employees Fund
Paul O'Connell - Pompano Beach P&F Pension Fund

12:10 - 1:30 PM

Lunch Break

Tournament Hall

1:30 - 2:30 PM

TLC Class of 2026 Team Meetings
Team #1 - Matt Harrelson - Paul O'Connell - Russ Kamp - **Masters A**
Team #2 - Phyllis Shaw - Debbie McCoy - Steve Roth - **Masters B**
Team #3 - Ernie Ramos - Samantha Mootoosammy - Tim Nash - **Masters C**

2:30 - 3:30 PM

Team Discussion/General Session

3:30 - 4:00 PM

Afternoon Refreshment Break

Masters Ballroom D

4:00 - 5:00 PM

Palm Beach Gardens Police - Case Study Introduction
Marc Glass - Trustee/TLC Class of 2025
Greg Mull - Trustee/TLC Class of 2025

4:30 - 11:00 PM

Hospitality and Study Hall

Tournament Hall A

**** Check-out must be completed by 5:30 PM ****



TLC AGENDA TUESDAY

Breakfast from 7:00 AM-8:00 AM
Masters Ballroom D

Masters Ballroom D

OCTOBER 7TH, 2025

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

8:00 - 9:00 AM

Palm Beach Gardens Case Study
Investment Police Statement
City Ordinance

9:00 - 10:30 AM

Palm Beach Gardens Case Study - Income
Impacts of Risk on Return
Goeff Gerber - FPPTA Education Committee

10:30 - 11:00 AM

Morning Refreshment Break

Masters Ballroom D

11:00 - 12:10 PM

Palm Beach Gardens Case Study - Income
Impacts of Risk on Return
Goeff Gerber - FPPTA Education Committee

12:10 - 1:30 PM

Lunch Break

Tournament Hall

1:30 - 2:15 PM

Palm Beach Gardens Case Study - Contributions
Marc Glass - Trustee/TLC Class of 2025
Greg Mull - Trustee/TLC Class of 2025
Pete Strong - Gabriel Roeder Smith

2:20 - 3:00 PM

Palm Beach Gardens Case Study - Benefits & Expenses

3:00 - 3:30 PM

Palm Beach Gardens Case Study - Monte Carlo Analysis
Goeff Gerber - FPPTA Education Committee

3:30 - 4:00 PM

Afternoon Refreshment Break

Masters Ballroom D

4:00 - 5:00 PM

TLC CLASS of 2026 Team Meetings

5:00 - 6:00 PM

TLC Sponsors Reception

Players BC

Trustee Leadership Council Sponsors



Investment
Advisors



CONSTITUTION
Capital Partners



FOSTER & FOSTER
ACTUARIES AND CONSULTANTS



GARCIA HAMILTON & ASSOCIATES, L.P.



ARISTOTLE



CAPITAL MANAGEMENT



SAXENA WHITE



Bernstein Litowitz
Berger & Grossmann LLP





CPPT AGENDA

WEDNESDAY

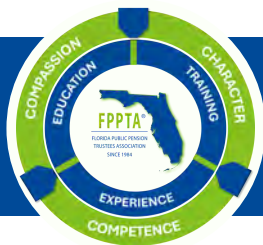
OCTOBER 8TH, 2025

Breakfast 7:00 – 8:45 AM
Champions Ballroom Foyer

8:00 - 10:00 AM

Electronic CPPT Testing

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



CEU AGENDA

WEDNESDAY

OCTOBER 8TH, 2025

Breakfast 7:00 – 8:45 AM
Champions Ballroom Foyer

**** Check-out must be completed by 10:30 AM ****

General Session

Champions Ballroom DE

8:45 - 9:00 AM

FPPTA Update

Kim Prior, CEO

9:00 - 9:15 AM

Why Get Involved with the TLC Class of 2027

Greg Mull - Trustee

Marc Glass - Trustee

Palm Beach Gardens Police

9:15 - 10:15 AM

FPPTA Legal Panel

Ken Harrison - Moderator

FPPTA Education Committee

Ron Cohen - Lorium Law

Pedro Herrera - Sugarman Susskind Braswell & Herrera

Bonni Jensen - Klausner Kauffman Jensen Levinson

Mark Floyd - Mierzwa & Floyd



TLC AGENDA

WEDNESDAY

OCTOBER 8TH, 2025

Breakfast 7:00 – 8:45 AM
Champions Ballroom Foyer

Masters Ballroom D

**** Check-out must be completed by 10:45 AM ****

8:00 - 8:30 AM

TLC Class of 2026 Team meetings

8:30 - 10:30 AM

Team Discussion /General Session

Geoff Gerber - FPPTA Education Committee



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 inside and outside of every room. Daily check-ins and check-outs were 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 Sean McKinstry, the FPPTA's Director of Education, at 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.



Upcoming Virtual Training Event



Navigating the Gifts Labyrinth October 24th, 2025 at 2PM

Caroline Klancke

Executive Director of the Florida Ethics Institute

All trustees are public officers subject to heightened gifts and anti-bribery restrictions contained in the Florida Code of Ethics.

Have questions regarding compliance with Florida's gifts laws implicated by gifts from vendors, lobbyists, and others? The Florida Ethics Institute and the FPPTA are here to help!

On Friday, Oct 24th at 2:00 p.m. (EST) the FPPTA invites you to join us at a virtual training featuring a live Q&A for FPPTA members to provide you with the informational tools you need to easily understand and navigate the gifts labyrinth during the holiday season and beyond!

Renee Lipton Relief Fund and Raymond T. Edmondson Scholarship

Renee Lipton Relief Fund

The Renee Lipton Relief Fund was established to provide financial assistance to FPPTA active or Associate Members in good standing who may have passed away or fallen upon hard times. This includes situations such as medical issues, loss of employment, tragic events, or support for widows, widowers, or close family members of fallen members. The fund is primarily supported through proceeds from the Annual Associates' Charitable Golf Classic, along with donations from Associate and active members. The Relief Fund Committee may also accept contributions from other sources.

Assistance is available to FPPTA active participants, retirees, or Associate Members in good standing, as defined in the FPPTA By-Laws. Immediate family members or spouses of eligible members may also qualify, subject to the Relief Fund Committee's discretion.



Raymond T. Edmondson Scholarship Award

The Raymond T. Edmondson Scholarship Award, established by the FPPTA Board of Directors, honors the legacy of Raymond T. Edmondson, the founder and longtime CEO of the FPPTA. Serving the organization for over 30 years and later as Director Emeritus, Raymond Edmondson dedicated his life to protecting the retirement security of Florida's public employees. Beyond his FPPTA leadership, he was a lifelong public servant working as a Fort Lauderdale police officer for 23 years, serving in the U.S. Navy Seabees, and volunteering as a certified firefighter.



Upcoming Events

Trustee School

February 1st– 4th, 2026
Rosen Centre

TLC Level 3

April 12th –15th, 2026
Embassy Suites St Augustine
Beach Oceanfront Resort

42nd Annual Conference

June 28th –July 1st, 2026
Renaissance Orlando at
SeaWorld

Trustee School

September 27th – 30th, 2026
Rosen Shingle Creek

Don't miss our
Winter Trustee School
February 1st to 4th, 2026
at the Rosen Centre, Orlando, Florida



☑ Mark Your Calendar

