



Fall Trustee School Agenda

September 27th - 30th, 2026

**Rosen Shingle Creek
Orlando, Florida**

Checking In & 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.



Check-In



Check-Out

General Information

FPPTA Attendance Policy: To ensure accurate CPPT attendance tracking, please remember to scan the QR code outside each session room:

- Morning Check-In: At the start of your 1st session.
- Afternoon Check-In: After lunch.
- Check-Out: Immediately following your final session of the day.

Note: Session rooms have limited capacity, so please plan accordingly.

Basic CPPT Program: The FPPTA Basic CPPT Welcome & Orientation on Sunday is required for all Trustees entering the Basic CPPT Program.

Mentorship Meeting: There will be a "Meet & Greet" event with the Mentorship Committee at 4:30 PM for all new Trustees.

CEU Credits: Attendees will earn ten (10) CEUs by completing the daily check-ins & check-outs throughout the Trustee School.

Note: You MUST attend the entire session on Wednesday before signing out.

Membership Note: The FPPTA is committed to delivering top-tier education to our Members. As our curriculum continues to evolve, your feedback is essential to keeping our educational programs exceptional – please share any suggestions you may have with Sean McKinstry, the FPPTA's Director of Education, at SeanMcKinstry@fppta.org.

Hotel Reminder: Please note that the FPPTA cannot control the venue's room temperature & it is recommended that all attendees come prepared for a cooler than normal environment.

Disclaimer: The information in this program & 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.

FPPTA Staff thanks you for your cooperation!



BASIC CPPT WELCOME & ORIENTATION

Sunday, September 27, 2026

8:15 AM - 9:15 AM - Breakfast - Sebastian Foyer

★ Check-In

★ Check-Out

★ 9:00 AM
Check-In

9:15 - 9:30
AM

General Session

Sebastian I-1

Welcome

Kim Prior, FPPTA Chief Executive Officer

9:30 - 10:00
AM

The Mission of the FPPTA

Dwight Mattingly, FPPTA Board of Directors' Chairman

10:00 - 11:00
AM

FPPTA Mentorship Program

FPPTA Education Committee

Gequita "Gee" Cowan, Ocoee General Employees' Pension Fund

M. Norris Park, FPPTA Board of Directors' Treasurer

11:00 - 11:30
AM

Morning Break

Sebastian Foyer

11:30 AM -
12:30 PM

The History of Public Pensions

Adam Levinson, Klausner, Kauffman, Jensen, & Levinson, P.A.

12:30 - 1:30
PM

Lunch Break

Sebastian I-4

★ 1:15 PM
Check-In

1:30 - 2:15
PM

Shaping the Future - Trustee by Trustee: FPPTA Education & Resources

Sean McKinstry, FPPTA Director of Education

Dave West, FPPTA Director of Curriculum

2:15 - 3:00
PM

Meet Ray, The FPPTA's Educational Ai Bot

FPPTA Bot Committee

Don Trone, FPPTA Education Consultant

★ 3:00 PM
Check-Out

5:00 - 7:00
PM

Welcome Gathering

Sebastian K

Shaping the Future - Trustee by Trustee



Wifi

Network: Convention Wireless

Access Code: SCFTS

BASIC

Monday and Tuesday

September 28th & 29th, 2026

◆ Check-In
◆ Check-Out

Monday

7:00 AM - 8:00 AM - Breakfast - Sebastian Foyer
7:00 AM - 3:00 PM - Registration - Sebastian Desk

General Session *Sebastian J*

Opening Comments
Kim Prior, FPPTA Chief Executive Officer

FPPTA Tools & Resources: Ray & FPPTA Education
Sean McKinstry, FPPTA Director of Education
Don Trone, FPPTA Education Consultant
Matthew Bertram, FPPTA Technology Consultant

**NIRS Retirement in American Podcast:
Impact of Property Tax Legislation on Florida
Municipalities**
(A live taping of the NIRS' Podcast)
Dan Doonan, National Institute on Retirement Security

Morning Break *Sebastian Foyer*

Basic Sessions *Sebastian I-1*

**Governance for Exemplary Leadership &
Stewardship**
Don Trone, FPPTA Education Consultant

Overview of Trustee Ethics in Florida
Caroline Klancke, FPPTA Ethics Consultant

Lunch Break *Sebastian K*

**Fundamental Equation of Pension Plan
Financing Pension Formula: $C + I = B + E$**
Sara Carlson, Foster & Foster Consulting Actuaries,
Inc.

**Foundational Economics for Public
Pension Plan Trustees**
Dr. Mary Kelly, FPPTA Economist

Afternoon Break *Sebastian Foyer*

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

Hospitality & Study Hall *Wekiwa 5*

Tuesday

7:00 AM - 8:00 AM - Breakfast - Sebastian Foyer
7:00 AM - 3:00 PM - Registration - Sebastian Desk

Basic Sessions *Sebastian I-1*

**Pre-Funding vs. Pay-As-You-Go Pension
Plans**
Eric Atwater, Aon

**Actuarial Valuations of Defined Benefit
Plans**
Kevin Spanier, Gallagher

Morning Break *Sebastian Foyer*

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

**Alphabet Soup for the Soul:
Practical Application & Examples**
Joe Griffin, Foster & Foster Consulting Actuaries,
Inc.

Lunch Break *Sebastian K*

Actuary's Perspective to Asset Allocations
Joe Griffin, Foster & Foster Consulting Actuaries,
Inc.

Funding Implications
Doug Lozen, Foster & Foster Consulting Actuaries,
Inc.

Afternoon Break *Sebastian Foyer*

Basic Program Review

Hospitality & Study Hall *Wekiwa 5*

INTERMEDIATE

Monday and Tuesday

September 28th & 29th, 2026

◆ Check-In
◆ Check-Out

Monday

7:00 AM - 8:00 AM - Breakfast - *Sebastian Foyer*
7:00 AM - 3:00 PM - Registration - *Sebastian Desk*

◆ 7:45 AM
Check-In

General Session *Sebastian J*

8:00 AM

Opening Comments
Kim Prior, FPPTA Chief Executive Officer

8:00 - 9:00
AM

FPPTA Tools & Resources: Ray & FPPTA Education
Sean McKinstry, FPPTA Director of Education
Don Trone, FPPTA Education Consultant
Matthew Bertram, FPPTA Technology Consultant

9:00 - 10:00
AM

NIRS Retirement in American Podcast:
Impact of Property Tax Legislation on Florida Municipalities
(A live taping of the NIRS' Podcast)
Dan Doonan, National Institute on Retirement Security

10:00 - 10:30
AM

Morning Break *Sebastian Foyer*

Intermediate Sessions *Sebastian I-2*

10:30 - 11:15
AM

Chapter 112 - 175 - 185
Adam Levinson, Klausner, Kaufman, Jensen, & Levinson, P.A.

11:20 AM -
12:15 PM

Actuarial Assumptions
Doug Lozen, Foster & Foster Consulting Actuaries, Inc.

12:15 - 1:30
PM

Lunch Break *Sebastian K*

◆ 1:15 PM
Check-In

1:30 - 2:15
PM

The Factors Driving Market Cycles
Dr. Mary Kelly, FPPTA Economist

2:20 - 3:15
PM

Behavioral Governance: Leadership
Don Trone, FPPTA Education Consultant

3:15 - 3:45
PM

Afternoon Break *Sebastian Foyer*

3:45 - 4:30
PM

Establishing the Purpose of the Investment Program
Steve Roth, Dahab & Associates
Sarah Carlson, Foster & Foster Consulting Actuaries, Inc.

◆ 4:30 PM
Check-Out

4:30 - 11:00
PM

Hospitality & Study Hall *Wekiwa 5*

Tuesday

7:00 AM - 8:00 AM - Breakfast - *Sebastian Foyer*
7:00 AM - 3:00 PM - Registration - *Sebastian Desk*

◆ 7:45 AM
Check-In

Intermediate Sessions *Sebastian I-2*

8:00 - 8:15
AM

Housekeeping & Announcements

8:15 - 9:15
AM

Advancing Ethics & Professionalism
Caroline Klancke, FPPTA Ethics Consultant

9:20 - 10:00
AM

Investment Policy Statement & City Ordinance
Tyler Grumbles, Mariner

10:00 - 10:30
AM

Morning Break *Sebastian Foyer*

10:30 AM -
12:15 PM

Asset Classes & Benchmarks
Moderator: **Scott Owens**, Graystone Consulting
Geoff Gerber, Twin Capital Management
Ryon Acey, Agincourt
Maya Packer, Barings

12:15 - 1:30
PM

Lunch Break *Sebastian K*

◆ 1:15 PM
Check-In

1:30 - 2:30
PM

Private Debt & Private Equity
[speaker name TBD], Taurus Private Markets

2:35 - 3:15
PM

Asset Allocation: Determining the Optimal Allocation of Capital
Kerry Richardville, Mariner

3:15 - 3:45
PM

Afternoon Break *Sebastian Foyer*

3:45 - 5:00
PM

Intermediate Program Review

◆ 5:00 PM
Check-Out

4:30 - 11:00
PM

Hospitality & Study Hall *Wekiwa 5*





ADVANCED

Monday and Tuesday

September 28th & 29th, 2026

◆ Check-In
◆ Check-Out

Monday

7:00 AM - 8:00 AM - **Breakfast** - Sebastian Foyer
7:00 AM - 3:00 PM - **Registration** - Sebastian Desk

◆ 7:45 AM
Check-In

General Session *Sebastian J*

8:00 AM

Opening Comments

Kim Prior, FPPTA Chief Executive Officer

8:00 - 9:00
AM

FPPTA Tools & Resources: Ray & FPPTA Education

Sean McKinstry, FPPTA Director of Education
Don Trone, FPPTA Education Consultant
Matthew Bertram, FPPTA Technology Consultant

9:00 - 10:00
AM

NIRS Retirement in American Podcast: Impact of Property Tax Legislation on Florida Municipalities

(A live taping of the NIRS' Podcast)
Dan Doonan, National Institute on Retirement Security

10:00 - 10:30
AM

Morning Break *Sebastian Foyer*

Advanced Sessions *Sebastian I-3*

10:30 - 11:30
AM

Asset Class Performance / Market Cycles

Dr. Mary Kelly, FPPTA Economist

11:35 AM -
12:15 PM

Understanding the Impact of Market / Economic Cycles on Asset Class Performance

Geoff Gerber, Twin Capital Management

12:15 - 1:30
PM

Lunch Break *Sebastian K*

◆ 1:15 PM
Check-In

1:30 - 2:10
PM

Alternative Investments

Bill Dahab, Dahab & Associates

2:15 - 3:15
PM

Private Investments

Rob Hatch, Constitution Capital Partners
Beth Bowen, Asset Consulting Group
Laura Stolfi, Nuveen

3:15 - 3:45
PM

Afternoon Break *Sebastian Foyer*

3:45 - 4:30
PM

Ethics Master Class

Caroline Klancke, FPPTA Ethics Consultant

◆ 4:30 PM
Check-Out

4:30 - 11:00
PM

Hospitality & Study Hall *Wekiwa 5*

Tuesday

7:00 AM - 8:00 AM - **Breakfast** - Sebastian Foyer
7:00 AM - 3:00 PM - **Registration** - Sebastian Desk

◆ 7:45 AM
Check-In

Advanced Sessions *Sebastian I-3*

8:00 - 8:40
AM

Investment Program Operations

Steve Roth, Dahab & Associates

8:45 - 9:15
AM

Establishing A Funding Policy

Pete Strong, Gabriel Roeder Smith

9:20 - 10:00
AM

International Equity / Developed & Emerging Markets

Kurt Wood, DRZ Investment Advisors

10:00 - 10:30
AM

Morning Break *Sebastian Foyer*

10:30 - 11:15
AM

Real Estate

Tim Nash, Intercontinental Real Estate

11:20 - 12:15
PM

Fixed Income Markets

David Jackson, Richmond Capital Management

12:15 - 1:30
PM

Lunch Break *Sebastian K*

◆ 1:15 PM
Check-In

1:30 - 2:00
PM

Modifications of Pension Plans

Mark Floyd, Mierzwa & Floyd, P.A.

2:00 - 3:15
PM

Putting It All Together: Applied Governance

Palm Beach Gardens Police Officers' Pension
Fund Case Study

Geoff Gerber, Twin Asset Management
Greg Mull, Palm Beach Gardens Police Officers'
Pension Fund
Marc Glass, Palm Beach Gardens Police Officers'
Pension Fund

3:15 - 3:45
PM

Afternoon Break *Sebastian Foyer*

3:45 - 5:00
PM

Advanced Program Review

◆ 5:00 PM
Check-Out

4:30 - 11:00
PM

Hospitality & Study Hall *Wekiwa 5*



CEU Agenda

Monday

September 28th, 2026

★ Check-In
★ Check-Out

7:00 AM - 3:00 PM

Registration -
Sebastian Desk

7:00 AM - 8:00 AM - **Breakfast** - *Sebastian Foyer*

★ 7:45 AM Check-In

General Session

Sebastian J

8:00 AM

Opening Remarks

Kim Prior, FPPTA Chief Executive Officer

FPPTA Tools & Resources: Ray & FPPTA Education

Sean McKinstry, FPPTA Director of Education
Matthew Bertram, FPPTA Technology Consultant
Don Trone, FPPTA Education Consultant

8:00 - 9:00
AM

NIRS Retirement in American Podcast:
Impact of Property Tax Legislation on Florida Municipalities

(A live taping of the NIRS' Podcast)

Dan Doonan, National Institute on Retirement Security

9:00 - 10:00
AM

10:00 - 10:30
AM

Morning Refreshment Break

Sebastian Foyer

Foundational Learning
Sebastian L-1

Accelerated Learning
Sebastian L-2

Exchange Learning
Sebastian L-3

10:30 - 11:00
AM

Expanded Trustee Experience
Jason Spinner, Cape Coral Firefighters' Pension Fund

Fixed Income:
Tool Box of Many Uses
Jeff Detwiler, Garcia Hamilton & Associates

No Session

11:05 AM -
12:10 PM

Disability Overview
Pedro Herrera, Jones Walker LLP

Communicating Investment Principles
Christian Bay, Dimensional Fund Advisors

Around the Horn:
Private Credit / Debt
Kerry Richardville, Mariner
Laura Stolfi, Nuveen
Peter Kenny, Golub Capital
Leanne Schmitt, Star Mountain Capital

12:15 - 1:30
PM

★ 1:15 PM Check-In

Lunch Break

Sebastian K

1:30 - 2:00
PM

Private Credit:
Know Before You Go
Mike Lucci, Bloomfield

The Investment Manager Interview:
Setting Expectations & Understanding the Performance Cycle
Chris Greco, Waycross Partners

Meet Ray: The FPPTA's Educational Ai Bot
Discover how Ray can help you maneuver your role as a Trustee through demos & exercises.

2:05 - 3:10
PM

Around the Horn:
Public Equity & Fixed Income
Brad Penter, Callan, LLC
David Jackson, Richmond Capital Management
Jason Turner, Great Lakes Advisors

Keys to Evaluating an Equity Manager
Russ Kamp, Ryan ALM, Inc.

FPPTA Bot Committee
Fred Nesbitt, PhD., FPPTA Media Consultant

3:10 - 3:40
PM

Afternoon Break

Sebastian Foyer

General Session

Sebastian J

3:45 - 4:30
PM

Economic Outlook: So, Where Are We Now?
Jeff Schulze, ClearBridge Investments

4:30 - 11:00
PM

★ 4:45 PM Check-Out

Hospitality and Study Hall

Wekiwa 5



CEU Agenda

Tuesday

September 29th, 2026

◆ Check-In
◆ Check-Out

7:00 AM - 8:00 AM - **Breakfast** - Sebastian Foyer

7:00 AM - 3:00 PM

◆ 7:45 AM Check-In

Registration -
Sebastian Desk

Foundational Learning
Sebastian L-1

Accelerated Learning
Sebastian L-2

Exchange Learning
Sebastian L-3

8:00 - 8:30
AM

Establishing the Investment Portfolio

Beth Bowen, Asset Consulting Group

Is Value Investing Dead?

Dave West, FPPTA Director of Curriculum

Geoff Gerber, Twin Capital Management

Kurt Wood, DRZ

Meet Ray: The FPPTA's Educational Ai Bot

Discover how Ray can help you maneuver your role as a Trustee through demos & exercises.

FPPTA Bot Committee

Fred Nesbitt, PhD., FPPTA Media Consultant

8:35 - 9:05
AM

Economic & Market Cycles

Steve Stack, Highland Capital Management, LLC

9:10 - 10:00
AM

[title of session TBD]

Megan Anderson, Nuveen

Personalized Medicine

Owen Fitzpatrick, Aristotle

No Session

10:00 - 10:30
AM

Morning Refreshment Break

Sebastian Foyer

10:30 - 11:00
AM

Overview of Fixed Income

Brian Elliot, Genter Capital

Demystifying Specialty Sectors

Sabrina Unger, American Realty Advisors

Florida Public Pensions:
"A Case Study of Excellence in Governance & Sustainability"

Case Study: Town of Palm Beach

Dave West, FPPTA Director of Curriculum

Pete Strong, Gabriel Roeder Smith

11:05 - 11:35
AM

Equity Investing in a Multi-Polar World

Gustavo Bikkesbakker, Walter Scott

Emerging Market Stocks Boom During Geopolitical Unrest

Natascha Willans, ABS Global

11:40 AM - 12:10 PM

Private Equity Markets

Rob Hatch, Constitutional Capital Partners

The Rise of Credit Secondaries

Leanne Schmitt, Star Mountain Capital

No Session

12:15 - 1:30
PM

◆ 1:15 PM Check-In

Lunch Break

Sebastian K

1:30 - 2:00
PM

Key Elements of the Actuary Report

Eric Atwater, Aon

Broadly Syndicated Private & Public Loans

Mark Guariglia, Bracco Asset Management LP

Private Real Estate Market Update

Moderator: **Frank Wan**, BCA

Ben Lanthrop, Bailard, Inc.

Tim Nash, Intercontinental Real Estate

2:05 - 2:35
PM

Key Elements of the Consultant Report

Scott Owens, Graystone Consulting

Residential Real Estate Investment Space

George Tietjen, Sentinel Real Estate Corporation

2:40 - 3:10
PM

ROR Assumption:
Addressing the Central Tension

Aaron Lally, Meketa
Shawn Bowen, Meketa

Overview of Farmland / Agriculture

Julie Koeninger, USAgriculture, LLC

No Session

3:15 - 3:45
PM

Afternoon Break

Sebastian Foyer

3:45 - 4:30
PM

Division of Labor Guidelines:
Best Practice for Cyber Governance

Scott Baur, Resource Centers, LLC
David Robinson, Sugarman, Susskind, & Braswell

Trends in Securities Litigation & Portfolio Monitoring

Moderator: **Chris Spencer**, FPPTA Board of Directors' Vice Chairman

Andrea Farah, Esq., Lowey Dannenberg, P.C.

Adam Savett, Wolf Popper

[speaker name TBD], Scott & Scott

No Session

4:30 - 11:00
PM

◆ 4:45 PM Check-Out

Hospitality and Study Hall

Wekiwa 5



CPPT EXAMS

Wednesday

September 30th, 2026

◆ Check-In
◆ Check-Out

7:00 AM - 8:00 AM - Breakfast - Sebastian Foyer

8:00 - 10:00
AM

Electronic CPPT Testing

Participants are expected to bring a wifi capable device to take their exam.



CEU Agenda

Wednesday

September 30th, 2026

◆ Check-In
◆ Check-Out

7:30 AM - 8:30 AM - Breakfast - Sebastian Foyer

◆ 8:15 AM Check-In

General Session

Sebastian J

8:30 - 8:45
AM

Closing Remarks

Dwight Mattingly, FPPTA Board of Directors' Chairman

8:45 - 10:00
AM

FPPTA Legal Panel

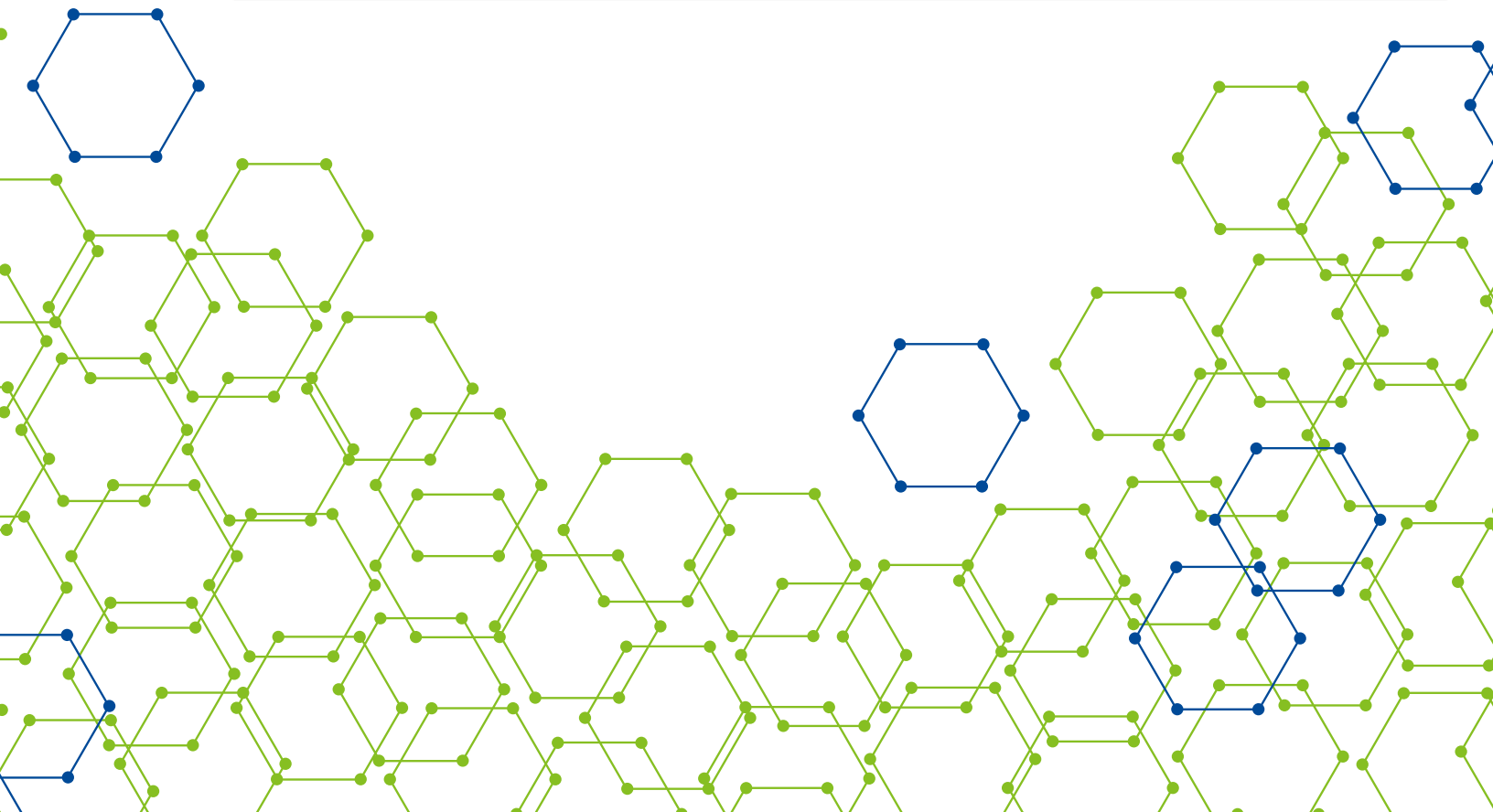
Bonni Jensen, Klausner, Kaufman, Jensen, & Levinson, P.A.

David Robinson, Sugarman, Susskind, & Braswell

Ron Cohen, Lorium Law

Mark Floyd, Mierzwa & Floyd, P.A.

◆ 10:00 AM
Check-Out



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.

The scholarship is open to all FPPTA active Members, Associate Members, and Members' spouses, children, & grandchildren seeking financial assistance at a college, university, police academy, fire academy, trade or vocational school.



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.

Upcoming Events

Trustee School	January 31 - February 3, 2027	Rosen Centre
Trustee Leadership Council	April 2027	St. Augustine Embassy Suites Beach Oceanfront Resort
43rd Annual Conference	June 27 - 30, 2027	Signa by Hilton Bonnet Creek
Trustee School	September 26 - 29, 2027	Sawgrass Marriott Resort
Trustee School	January 30 - February 2, 2028	Rosen Centre



Save the Date

Winter Trustee School

January 31 - February 3, 2027

Rosen Centre

Join us at the Rosen Centre for the Winter Trustee School, January 31 - February 3, 2027. The Winter Trustee School offers the FPPTA's hallmark CPPT program as well as a wide variety of CEU sessions for those maintaining continuing education credits.

Shaping the Future - Trustee by Trustee

