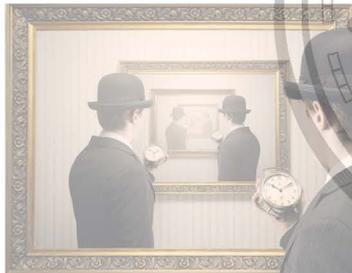
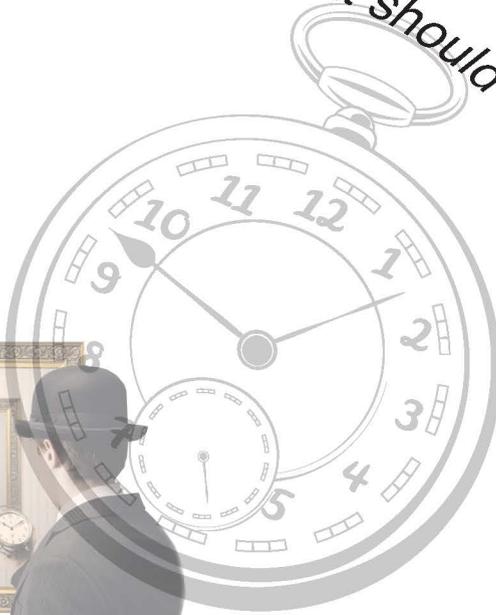


**"DEJA VU ALL OVER AGAIN"**

Lessons from our past that should frame our future

- Yogi Berra



**FPPTA 34<sup>th</sup> ANNUAL CONFERENCE**

**Rosen Shingle Creek**

**Orlando, FL**

**June 24 – 27, 2018**



**FPPTA 34<sup>th</sup> Annual Conference**  
**Rosen Shingle Creek, Orlando**  
**June 24-27, 2018**

**Sunday, June 24<sup>th</sup>**

6:00 – 7:30 PM

**Welcome Gathering**

**Monday, June 25<sup>th</sup>**

7:15 – 8:15 AM

**Continental Breakfast**

8:15 – 9:15 AM

**Opening Ceremonies**

*Introduction of FPPTA Board of Directors*

*Presentation of Colors*

*Welcome – Kim Prior, FPPTA CEO*

*FPPTA BOD Election / Candidates*

*FPPTA Awards & Recognitions*

9:15 – 10:00 AM

**A 20/20 Vision for the Future of Health Care:  
Challenges for Public Pensions and Private Individuals**

*Jeffrey Bauer, PhD, Health Futurist & Medical Economist*

Dr. Jeff Bauer, a nationally recognized health futurist and medical economist, looks backward and forward 20 years to develop understanding and insight for the leaders of Florida's public pensions. His comments address changes that have occurred and are likely to emerge in the medical marketplace, with a focus on what will be different from the past and how to prepare for uncertain futures—both professionally and personally.

10:00 –11:00 AM

**Morning Refreshment Break (in the Exhibit Hall)**

11:00 - 11:30 AM

**Media Coverage ... What's Going On?**

*Tim O'Brien, Award Winning Journalist*

The media (both print and electronic) have changed over the last twenty+ years. The change has been dramatic--in some ways positive and other ways negative. There was a time when most Americans got their news from the major TV networks and their early evening broadcasts. That is hardly the case today, with a vast potpourri of cable channels and the Internet. Donald Trump has been a factor as well. Tim will have some stories about how it was and how it is today. Although this session will primarily focus on the media ... Tim who covered the Supreme Court will also have a few tales about the Supreme Court--including its resolution of some important pension cases ... something all trustees will also appreciate.

11:30 –12:30 PM

**What Makes Traditional Pensions Smart Policy — and Good for Taxpayers**

*Daniel Cay Johnston, Pulitzer Prize Winning Reporter*

Traditional defined benefit pensions are the least costly, most efficient and lowest risk way to provide old age income for public employees from police to teachers, biologists to zookeepers. Speaker David Cay Johnston will explain what's required to make these plans rock solid and how to get voters to

understand the benefits of such plans, while also exposing myths about public employee pensions. Johnston is 2001 Pulitzer Prize winner whose reporting on taxes caused two presidents to change their policies and shut down so many tax dodges that he has been called the “de facto chief tax enforcement officer of the United States.” Four of his seven books were national bestsellers, two of them global bestsellers. He specializes in complex economic, law enforcement and regulatory issues, which he explains in plain English.

12:30 - 2:00 PM

**LUNCH (on your own)**

2:00 - 3:00 PM

**Communicating to Your City Commission**

FPPTA’s three communications experts will provide ideas on how to communicate positive and educational information on public pension plans to your city commission and city hall. Special materials will be presented that are effective in making the case for defined benefit plans, but are ineffective if not shared or properly shared with city hall officials. A practical hands-on workshop will show attendees how to use FPPTA materials that promote the strengths of DB plans and defend them against the most common criticisms to the best effect in the digital age.

- *Susan Marden, FPPTA Public Relations Consultant*
- *Fred Nesbitt, FPPTA Media Consultant*
- *Sean McKinstry, FPPTA Director of Research*

3:00 – 4:00 PM

**FPPTA Legal Panel**

Moderator: Grant McMurry, FPPTA Education Committee (retired)

As trustees, legal issues are a constant in your decision making process. This moderated panel discussion will address both past and present legal issues and decisions impacting public retirement plans in the state of Florida. It is also important to understand the specific reasons for past decisions and how the pension landscape will be impacted in the future.

- *Ron Cohen, Rice, Pugatch, Robinson, Storfer & Cohen*
- *Adam Levinson, Klausner, Kaufman, Jensen, & Levinson, P.A.*
- *Ken Harrison, Sugarman & Susskind*

4:15 PM

**Daily Raffle Drawings / FPPTA Exhibit Hall**

**Tuesday, June 26<sup>th</sup>**

7:15 – 8:15 AM

**Continental Breakfast**

8:20 – 8:30 AM

**Morning Session Announcements & Special FPPTA Video**

8:30 – 9:30 AM

**Crisis Management in the 21<sup>st</sup> Century ... Building an Invincible Brand**

*Melissa Agnes, President, Agnes + Day, Inc.*

Bad things happen to good companies. And issues come in all sort of sizes. The potential risks in modern-day business are greater, more dynamic, and less predictable than ever before. And yet, the greatest exposure does not lie within

these risks. Rather, it lies in having a team that is not prepared to anticipate, foresee, or respond to a rising threat, and its impact on your reputation, revenue, and relationships in real-time. If a negative situation were to strike your organization, how confident do you feel that your entire team would know precisely what to do? Would they know how to immediately and effectively manage the situation in a way that results in increased stakeholder trust and loyalty? In this program, Melissa Agnes, provides an applicable roadmap for helping you build an invincible brand through effective communication, issue management, and crisis readiness, resulting in increased organizational trust, credibility, and goodwill.

9:40 - 3:20 PM **Administrators Certificate Program** (Pre-registration required)

9:30 - 10:40 AM **Investment Returns ... The New Normal Re-Visited**  
Hosted by: Michael Spencer, FPPTA Dean of Faculty

The last few years have been blessed with investment returns in domestic equities and real estate far beyond what had been thought to be the “new normal” of returns following the financial crisis of 2008 and 2009. But what about from here forward? Will investment returns match actuarial assumptions over the intermediate term? Should we expect renewed arguments from those who oppose defined benefit plans that they are unaffordable? What should plans do? Our panel will address these questions from their different investment perspectives.

- *Samantha Azzarello, JP Morgan Asset Management*
- *Bart McMurry, Highland Capital Management*
- *Howard Bos, Richmond Capital Management*
- *Michael Welker, AndCo Consulting*

10:40 – 11:20 AM **Morning Refreshment Break (in the Exhibit Hall)**

11:20 - 12:45 PM **FPPTA Jeopardy Game**  
Hosted by: David Keeling

Content delivery can be enjoyable too. The FPPTA Jeopardy Game has been customized to create a more interactive environment for learning the ins and outs of being a public pension trustee. Topics to be covered will be actuarial concerns, investment consulting, legal and trustee oriented issues, along with the many skill sets necessary to be an effective trustee who serves the beneficiaries of your plan.

- *Mark Meyer, Aon Hewitt*
- *David West, AndCo Consulting*
- *Ken Harrison, Sugarman & Susskind*
- *Debbie McCoy, Tallahassee 175 Plan Trustee*

12:45 - 2:00 PM **LUNCH (on your own)**

2:00 - 2:45 PM **Market Movers and Shakers: Behavioral Economics, Sentiment and Fund Flows**  
*Samantha Azzarello, JP Morgan Asset Management*

This presentation will talk about some of the common behavioral economic concepts relevant to investor and market behavior. We will tie this into changes in sentiment we have seen in 2018 and discuss how this has been reflected in what investors are doing as shown through where fund flows have been moving.

2:45 - 3:45 PM

**FPPTA Legislative Update ... from Washington to Tallahassee to City Hall**

Moderator: Fred Nesbitt, FPPTA Media Consultant

Public pension systems have been under attack for the past 20 years. The charges and claims have varied as the economy and stock market have moved up and down. The panel will take a look-back at the legislative issues pension systems faced over the past years, are currently facing, and will likely face going forward. They will also describe the current political climate in these three capitals as it relates to public pensions – and what impacts the 2018 elections could have on the United States Congress, Florida Governor and State Legislature, and City Hall as trustees face new concerns affecting public pension.

- *Tom Lussier, President, The Lussier Group*
- *Jim Tolley, President of the Florida Professional Firefighters*
- *Paul Shamoun, Director of Finances, Florida League of Cities*

3:45 – 4:30 PM

**FPPTA Annual Membership Meeting / General Session Room**

4:30 PM

**Daily Raffle Drawings / General Session Room**

**Wednesday, June 27<sup>th</sup>**

7:30 – 8:35 AM

**CPPT Annual Breakfast**

7:30 - 8:35 AM

**Continental Breakfast**

8:35 – 8:45 AM

**Morning Session Announcements & Special FPPTA Video**

8:45 – 9:00 AM

**Administrators Certificate Presentations**

9:00 - 10:00 AM

**Make'em Laugh ... Make'em Think**

*David Keeling, British Lecturer, Actor, and Humourist*

“When the mouth is open for laughter you can pop in some food for thought”! In a world full of change the learners will inherit the earth while the knower’s will find themselves beautifully equipped to deal with a world that no longer exists. The session will look specifically at the art of engagement and the part that laughter and humour plays as a tool for change and effective leadership in the 21<sup>st</sup> century. It will also encompass in a variety of ways, curiosity, risk taking, the amazing brain, creativity, thinking skills and the values and skills required for happiness and success in life, learning and Leadership, which are: bravery, energy, creativity, openness, motivation and self-esteem.