



**GEORGIA ASSOCIATION OF PUBLIC PENSION TRUSTEES
EIGHTH ANNUAL TRUSTEE SCHOOL | SEPTEMBER 19-21, 2022 | ATHENS, GEORGIA**

- * **General session required for CRPF™ Basic and Advanced Course participants. Available to Continuing Education participants.**
- * **Breakout session required for CRPF™ Basic Course participants. Sessions are held in Athena Ballroom AB.**
- * **Breakout session required for CRPF™ Advanced Course participants. Sessions are held in Athena Ballroom CD.**
- * **Breakout session available to Continuing Education Course participants. Unless noted, sessions are held in Athena Ballroom E.**

MONDAY | SEPTEMBER 19, 2022

- 7:30am – 8:30am: **Registration and Breakfast** | Athena Ballroom Pre-Function and Athena Ballroom G
- 8:30am – 9:30am: **General Session:** | Athena Ballroom E
Welcome | Tim Milligan, *GAPPT President and Georgia Firefighters' Pension Fund*
1GS - "Ethics" | Ed Emerson, *Morris, Manning & Martin*
- 9:30am – 9:50am: **Morning Break** | Athena Ballroom Pre-Function
- 9:50am – 10:40am: **Breakout Sessions:**
2B - "Plan 101: A 30,000-Foot View" | Weston Lewis, *Callan*
2A - "Current Legal Climate" | Robert Killorin, *Faruqi & Faruqi*
2CE - "What Signals Are the Capital Markets Sending About the Future Economic Environment" | Adrian Cronje, *Balentine*
- 10:50am – 11:40am: **Breakout Sessions:**
3B - "Plan Documents: An Overview" | Paul Troup, *AmRET*
3A - "Types of Public Retirement Plans" | Ben Upchurch, *Milliman*
3CE - "Alternative Investment Manager Interviews" | Eric Wilcomes, *Taurus Private Markets*, Eric Assouad, *WP Global Partners*, Frederick Bailey, *City of Savannah*
- 11:40am – 12:40pm: **Networking Lunch** | Sponsored by Capital Dynamics | Athena Ballroom G
- 12:40pm – 1:30pm: **Breakout Sessions:**
4B - "Georgia State Law and Public Retirement Systems" | David Will, *Royal Will Law Firms*
4A - "Building, Measuring & Maintaining a Portfolio (Part 1)" | John Meyer, *Loomis Sayles*
4CE - "Fraudsters Gonna Fraud: Identifying and Analyzing Securities Fraud During Periods of Market Volatility" | Hannah Ross, *Bernstein Litowitz Berger & Grossmann LLP*
- 1:40pm – 2:30pm: **Breakout Sessions:**
5B - "Best Practices for Fiduciaries" | David Harris, *Gwinnett County Public Schools*
5A - "Building, Measuring & Maintaining a Portfolio (Part 2)" | Allen White, *Great Lakes Advisors*
5CE - "Actuarial Principles" | Ed Koebel, *Cavanaugh Macdonald Consulting*
- 2:30pm – 2:50pm: **Afternoon Break** | Athena Ballroom Pre-Function
- 2:50pm – 3:40pm: **Breakout Sessions:**
6B - "Board of Trustees" | Jay Schmitt, *Strategic Benefit Advisors*
6A - "Building, Measuring & Maintaining a Portfolio (Part 3)" | Ian Janacek, *CBIZ*
6CE - "Technology Metamorphosis" | Dan Nichols, *Jennison Associates*
- 3:50pm – 4:40pm: **Breakout Sessions:**
Basic Course Review Session (Day 1) | CRPF™ Leadership Team
Advanced Course Review Session (Day 1) | CRPF™ Leadership Team
7CE - "Plan Administration: Current Issues of Importance for Georgia Plans to Keep in Mind" | Brandt Barlow, *Peace Officers' Annuity & Benefit Fund*, LaShanda Dawkins, *MARTA*, Morgan Wurst, *Georgia Firefighters' Pension Fund*
- 5:30pm – 6:30pm: **Cocktail Reception** | Sponsored by Levi & Korsinsky LLP | Parthenon
- 6:30pm: **Dinner on Your Own**

TUESDAY | SEPTEMBER 20, 2022

- 7:30am – 8:40am: **Registration** | Athena Ballroom Pre-Function
Breakfast | Sponsored by American Realty Advisors | Athena Ballroom G
- 8:40am – 9:30am: **Breakout Sessions:**
7B - "Plan Administration Overview" | Amed Avila, *Fiduciary Trust International*
7A - "Introduction to Alternatives" | Kevin Campbell, *Taurus Private Markets*
8CE - "Is Your DC Plan Stuck in the Past Decade?" | Dan Notto, *JP Morgan Asset Management*, Alexandra Nobile, *JP Morgan Asset Management*
- 9:30am – 9:50am: **Morning Break** | Athena Ballroom Pre-Function
- 9:50am – 10:40am: **Breakout Sessions:**
8B - "Actuarial 101: Fundamentals of the Actuarial Assumption" | Kevin Spanier, *Buck*
8A - "Cash Management and Sources of Income" | Brian Smith, *Polen Capital*
9CE - "An Update of ESG" | Kweku Obed, *Marquette*
- 10:50am – 11:40am: **Breakout Sessions:**
9B - "Investing in Equity Markets" | Grant Duncan, *Brandes Investment Partners*
9A - "Actuarial 201: Pension Plan Funding and Managing Unfunded Liabilities" | Lawrence Watts, *Nyhart*
10CE - "Diversity and Inclusion: Revisited" | Ramona Bivins, *Douglas County*, Eric Atwater, *Aon*, Jeffrey Reeves, *The Reeves Law Firm*
- 11:40am – 12:40pm: **Networking Lunch** | Sponsored by Kessler Topaz Meltzer & Check, LLP | Athena Ballroom G
- 12:40pm – 1:30pm: **Breakout Sessions:**
10B - "Introduction to Bonds" | Beth Baron, *Richmond Capital Management*
10A - "Evaluation of Service Providers and the RFP Process" | Christopher Reynolds, *RiskBridge Advisors*
11CE - "Legislative Update" | Ed Emerson, *Morris Manning & Martin*
- 1:40pm – 2:30pm: **Breakout Sessions:**
11B - "Your Consultant and Performance Evaluation" | Margaret Belmondo, *NEPC*
11A - "Economic Cycles and Their Impact" | Allison Corbally, *PFM Asset Management*, Floyd Simpson, *PFM Asset Management*
12CE - "Energy: Disruption, Innovation, Myths, Investment Opportunities for the Future" | Brian Dausch, *T Rowe Price*, Jackie Fortner, *T Rowe Price*
- 2:30pm – 2:50pm: **Afternoon Break** | Athena Ballroom Pre-Function
- 2:50pm – 3:40pm: **Breakout Sessions:**
12B - "Asset Allocation" | Brian Griggs, *Nuveen*
12A - "Disability and OPEB" | Joe Griffin, *Foster & Foster*, Colleen Atchison, *Foster & Foster*
13CE - "Not Active vs. Passive, but Active AND Passive: Can It Work?" | Chris Greco, *Waycross Partners*
- 3:50pm – 4:40pm: **Breakout Sessions:**
Basic Course Review Session (Day 2) | *CRPF™ Leadership Team*
Advanced Course Review Session (Day 2) | *CRPF™ Leadership Team*
14CE - "Plan Sponsor Only Roundtable Discussion" | Tim Milligan, *Georgia Firefighters' Pension Fund* | Athena Ballroom G
- 5:30pm – 6:30pm: **Cocktail Reception** | Sponsored by Pension Technology Group | Parthenon
- 6:30pm: **Dinner on Your Own**

WEDNESDAY | SEPTEMBER 21, 2022

- 7:30am: **Continental Breakfast Available** | Grand Hall 4
- 8:00am – 10:00am: **CRPF™ Basic Course Examination** | Grand Hall 5
CRPF™ Advanced Course Examination | Grand Hall 5

Session titles, presenters and times are subject to change. All educational sessions and events take place at the Classic Center. Please refer to the event app, GAPPT|ACCESS, for session summaries, room assignments and other important information.

For questions about the GAPPT or the Eighth Annual Trustee School, please contact Sue Reynolds at execdirector@gappt.org or Merry Cella at admincoordinator@gappt.org.

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