



GEORGIA ASSOCIATION OF PUBLIC PLAN TRUSTEES®
TWELFTH ANNUAL TRUSTEE SCHOOL
SEPTEMBER 28-30, 2026 | HYATT PLACE | CLASSIC CENTER | ATHENS, GEORGIA

- * **Breakout session required for CRPF™ Basic Course participants.** Unless noted, sessions are held in Athena Ballroom AB.
- * **Breakout session required for CRPF™ Advanced Course participants.** Unless noted, sessions are held in Athena Ballroom CD.
- * **Breakout session for Continuing Education Course and Networking Only participants.** Unless noted, sessions are held in Athena Ballroom E.
- * **Breakout session for DCPF™ participants.** Unless noted, sessions are held in Athena Ballroom I. (Note: The DCPF™ Course sessions are on Tuesday only. Course participants are encouraged to attend CE Course sessions on Monday, September 28, 2026).

Due to accreditation purposes, ONLY registered CRPF™ and DCPF™ Course participants are allowed in those sessions. All other attendees are encouraged to attend Continuing Education Course sessions.

MONDAY | September 28, 2026

- 7:00am: **Registration Opens** | Athena Ballroom Pre-Function
- 7:00am – 8:15am: **Full Buffet Breakfast** | **Sponsored by Ariel Investments** | Athena Ballroom G
- 8:15am – 9:20am: **Welcome** | Tim Milligan, *GAPPT President, Georgia Firefighters' Pension Fund*
1B - "Ethics", 1A – Ethics, 1CE - Ethics | Ed Emerson, *Seyfarth Shaw LLP* | Athena Ballroom E
- 9:20am – 9:35am: **Morning Break** | Athena Ballroom Pre-Function
- 9:35am – 9:50am: **Breakout Sessions:**
"Introduction to the CRPF™ Basic Course" | CRPF™ Leadership Team
"Introduction to the CRPF™ Advanced Course" | CRPF™ Leadership Team
"ChatGAPPT: A Discussion with the GAPPT Leadership" | Tim Milligan, *GAPPT President*, Greg White, *GAPPT Board Development Committee Chair*, Sue Reynolds, *GAPPT Executive Director*
- 9:50am – 10:40am: **Breakout Sessions:**
2B - "Public Retirement Plan Basics" | Brandt Barlow, *Peace Officers' Annuity & Benefit Fund*
2A - "Types of Public Retirement Plans and Current Trends" | Mark Rhein, *Salem Trust Company*
2CE – "U.S. Macroeconomic Outlook" | Seamus Smyth, *Virtus Investment Partners*
- 10:50am – 11:40am: **Breakout Sessions:**
3B - "Plan Governance" | Paul Gaudet, *Callan LLC*
3A - "Building, Measuring & Maintaining a Portfolio (Part 1)" | Matthew Buxton, *Loomis Sayles, L.P.*
3CE - "Real World Lessons of Transitioning from Investment Consultant to OCIO" | Allison Corbally, *U.S. Bancorp Asset Management* and Greta Tinaglia, *Fulton County Schools Employees' Retirement Fund*
- 11:40am – 12:35pm: **Networking Lunch** | **Sponsored by Saxena White** | Athena Ballroom G(FH)
- 12:40pm – 1:30pm: **Breakout Sessions:**
4B - "Georgia State Law and Public Retirement Systems" | David Will, *David Will Law Firm*
4A - "Building, Measuring & Maintaining a Portfolio (Part 2)" | Dustin Finley, *Sage Advisory Services*
4CE – "Scheme Liability Under Rule 10b-5: (a) (c)rash Course" | Brittney Balser and Thomas Sperber, *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 3)" | Mike Dirstine, *PGIM Fixed Income*
5CE - "Differing Approaches to Meeting Public Plan Obligations: A Conversation" | Russell Kamp, *Ryan ALM, Inc.*, Chris Greco, *Waycross Partners*, Greg White, *Mariner (Panel Moderator)*
- 2:30pm – 2:50pm: **Afternoon Break** | Athena Ballroom Pre-Function
- 2:50pm – 3:40pm: **Breakout Sessions:**
6B - "Plan Administration and Understanding Plan Documents" | Scott Baur, *Resource Centers LLC*
6A - "Alternative Investments: Institutional-Level Insights" | Kevin Campbell, *Taurus Private Markets*
6CE - "Private Equity and Small Cap Equities: Valuation, Liquidity, and Implications for Strategic Asset Allocation" | Casey Cass, *Barrow Hanley Global Investors*
- 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 – "Legislative Update" | Ed Emerson, *Seyfarth Shaw LLP*
- 4:45pm – 6:00pm: **Networking Reception** | **Sponsored by Bernstein Litowitz Berger & Grossmann LLP** | Parthenon
- 6:00pm: **Dinner on Your Own**

TUESDAY | SEPTEMBER 29, 2026

7:15am:	Registration Opens Athena Ballroom Pre-Function
7:15am – 8:40am:	Breakfast Athena Ballroom G
8:25am – 8:40am:	Breakout Session: "Introduction to the DCPF™ Course" DCPF™ Subcommittee
8:40am – 9:30am:	Breakout Sessions: 7B - "Equity Market Fundamentals" Megan Anderson, <i>Winslow Capital</i> 7A - "Evaluation of Service Providers and the RFP Process" Chris Reynolds, <i>U.S. Bancorp Asset Management</i> 8CE - "Bond Management 2.0: How the Next Generation of Bond Portfolios is Being Influenced by Technology & AI" Rob Williams, <i>Sage Advisory Services</i> 1DC – "Foundations of Defined Contribution (DC) Plans" Weston Lewis, <i>Callan LLC</i>
9:30am – 9:50am:	Morning Break Sponsored by Wolf Popper Athena Ballroom Pre-Function
9:50am – 10:40am:	Breakout Sessions: 8B - "Understanding Fixed Income Markets" Matt Boden, <i>BCM Fixed Income</i> 8A - "Public Retirement Plans Regulatory Environment" Caroline Dorsey, <i>Seyfarth Shaw LLP</i> 9CE - "Plan Sponsor Only Roundtable Discussion" Tim Milligan, <i>Georgia Firefighters' Pension Fund</i> Athena Ballroom G 2DC – "Plan Governance and Fiduciary Responsibilities" Matt Nowak, <i>Marquette Associates</i>
10:50am – 11:40am:	Breakout Sessions: 9B - "Beyond Traditional Allocation: Alternative Investments" Laura Stolfi, <i>Churchill Asset Management</i> 9A - "A Deep Dive into the Consultant Report" David Barnes, <i>NEPC</i> 10CE - "Actuarial Assumptions, Funding Concepts, and Retirement Plan Design" Malichi Waterman and Robert Burrell, <i>Segal</i> 3DC – "Investments and Participant Communication" Yaniv Rubina, <i>OpenArc</i>
11:40am – 12:35pm:	Networking Lunch Sponsored by Nuveen Athena Ballroom G(FH)
12:40pm – 1:30pm:	Breakout Sessions: 10B - "Asset Allocation Essentials" John Sherman, <i>Federated Hermes</i> 10A - "Establishing a Rate of Return Assumption" Joe Griffin, <i>Foster & Foster</i> 11CE - "A Fresh Look at Asset Allocation" Christopher Gibson, <i>Atlanta Capital</i> 4DC – "Contributions, Eligibility, and Participant Management" Lawson Hauptfuhrer and Kyle Kane, <i>T. Rowe Price</i>
1:40pm – 2:30pm:	Breakout Sessions: 11B - "Your Consultant and Performance Evaluation" Ian Janecek, <i>CBIZ</i> 11A - "Pension Plan Funding and Managing Unfunded Liabilities" Lawrence Watts, Jr., <i>Nyhart</i> 12CE – "Recent Development (and Challenges) in Alternatives in Georgia" Kevin Campbell, <i>Taurus Private Markets</i> , Ashley Wolff, <i>Ares Management</i> and Morgan Wurst, <i>Georgia Firefighters' Pension Fund (Panel Moderator)</i> 5DC – "Plan Operations, Loans, Distributions, and Compliance Testing" Matson Hutchins, <i>Mariner</i>
2:30pm – 2:50pm:	Afternoon Break Sponsored by Wolf Popper Athena Ballroom Pre-Function
2:50pm – 3:40pm:	Breakout Sessions: 12B - "Understanding Actuarial Concepts" Lisa Bjornson, <i>Gallagher</i> 12A - "Economic Cycles and Their Impact" Tyler Grumbles, <i>Mariner</i> 13CE – "Pension Plan Hygiene" Eric Atwater, <i>Aon</i> 6DC – "Audits, Recordkeeping, Risk Management and Best Practices" Richard Reed, <i>Segal</i>
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 - "The Evolving Landscape of U.S. Infrastructure Financing" Matt Woods, <i>DWS</i> DCPF™ Course Review Session DCPF™ Subcommittee
4:45pm – 6:00pm:	Networking Reception Sponsored by Robins Geller Rudman & Dowd Parthenon
6:00pm:	Dinner on Your Own

WEDNESDAY | SEPTEMBER 30, 2026

7:30am – 9:30am:	Continental Breakfast Available Athena Ballroom G(HI)
8:00am:	Course Exam Check-In Athena Ballroom Pre-Function
8:00am – 9:30am:	CRPF™ Basic Course Examination Athena Ballroom F CRPF™ Advanced Course Examination Athena Ballroom F DCPF™ Course Examination Athena Ballroom F

Session titles, presenters, and times are subject to change. All educational sessions occur 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 Twelfth Annual Trustee School, please contact info@gappt.org.

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