



Bureau of Local Retirement Systems
Municipal Police Officers' & Firefighters' Trust Funds' Office
P.O. Box 3010
Tallahassee, FL 32315-3010
Tel: 850-922-0667 | Toll-Free: 877-738-6737

Ron DeSantis, Governor
Pedro Allende, Secretary

**51ST ANNUAL POLICE OFFICERS' AND FIREFIGHTERS'
PENSION TRUSTEE CONFERENCE
Dec. 13 - 15, 2022
DoubleTree by Hilton Orlando Airport
5555 Hazeltine National Drive, Orlando, FL 32812**



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TUESDAY, DEC. 13, 2022 – NEW TRUSTEE PROGRAM

- | | |
|------------------------|--|
| 8:00 a.m. – 8:30 a.m. | Registration (No Fee)
Coffee and Refreshments Available |
| 8:30 a.m. – 9:30 a.m. | Overview of Chapters 175 & 185
Stephen Bardin
Benefits Administrator
Department of Management Services
Division of Retirement
Tallahassee, Florida |
| 9:30 a.m. – 9:45 a.m. | Break |
| 9:45 a.m. – 11:30 a.m. | Fiduciary Responsibility/Investment Oversight
Tyler Grumbles
Consultant
AndCo Consulting
Orlando, Florida |
| 11:30 a.m. – 1:00 p.m. | Lunch on Your Own |
| 1:00 p.m. – 2:45 p.m. | Actuarial 101 – Pension Basics
Shelly Jones
Consultant
Gabriel, Roeder, Smith & Company
Fort Lauderdale, Florida |
| 2:45 p.m. – 3:00 p.m. | Break |
| 3:00 p.m. – 4:30 p.m. | Legal Issues
Bonni Jensen
Attorney at Law
Klausner, Kaufman, Jensen & Levinson, P.A.
Plantation, Florida |
| 4:30 p.m. | Adjourn until Wednesday |



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WEDNESDAY, DEC. 14, 2022 – FIRST DAY OF REGULAR PROGRAM

- | | |
|-------------------------|--|
| 7:30 a.m. – 8:00 a.m. | Registration (No Fee)
Coffee and Refreshments Available |
| 8:00 a.m. – 8:15 a.m. | Invocation
Chaplain Mike Vidal
Orlando Police Department

Pledge of Allegiance
Orlando Police and Fire Honor Guard

Welcome
Department of Management Services
Tallahassee, Florida |
| 8:15 a.m. – 9:15 a.m. | Current Market Update
Daniel Johnson
Partner, Consulting Director
AndCo Consulting
Orlando, Florida |
| 9:15 a.m. – 10:15 a.m. | Plan Administration
Caleb Hynson
Administrative Director
HYN Consulting
Largo, Florida |
| 10:15 a.m. – 10:30 a.m. | Break |
| 10:30 a.m. – 11:30 a.m. | Ways of Paying for Retiree Health Insurance
Robert Sugarman
Attorney & Partner
Sugarman Susskind Braswell & Herrera
Coral Gables, Florida |
| 11:30 a.m. – 1:00 p.m. | Lunch on Your Own |

Please silence electronic devices during presentations.



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WEDNESDAY, DEC. 14, 2022 – FIRST DAY OF REGULAR PROGRAM
(Continued)

1:00 p.m. – 2:00 p.m.

Actuarial Issues

Brad Heinrichs
President/CEO
Foster & Foster
Fort Myers, Florida

2:00 p.m. – 3:15 p.m.

**Internal Revenue Code Provisions Applicable to
Chapter 175 & 185 Plans**

Richard E. Burke, Esq.
Attorney at Law
Gray Robinson, P.A.
Orlando, Florida

3:15 p.m. – 3:30 p.m.

Break

3:30 p.m. – 4:30 p.m.

Disability Pension Hearings

Pedro Herrera
Attorney & Partner
Sugarman Susskind Braswell & Herrera
Coral Gables, Florida

4:30 p.m.

Adjourn until Thursday

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THURSDAY, DEC. 15, 2022 – SECOND DAY OF REGULAR PROGRAM

7:30 a.m. – 8:00 a.m.	Registration (No Fee) Coffee and Refreshments Available
8:00 a.m. – 9:00 a.m.	Nationwide Pension Plan Court Case Update Robert D. Klausner and Anna R. Klausner Parish Attorneys at Law Klausner, Kaufman, Jensen & Levinson, P. A. Plantation, Florida
9:00 a.m. – 10:00 a.m.	Actuarial Assumptions Chad Little Partner Freiman Little Actuaries, LLC Merritt Island, Florida
10:00 a.m. – 10:15 a.m.	Break
10:15 a.m. – 11:30 a.m.	Active Versus Passive Investing Frank Wan Senior Vice President Burgess Chambers & Associates Orlando, Florida
11:30 a.m. – 12:00 p.m.	Annual Report Update & Conference Wrap Up Stephen Bardin Benefits Administrator Department of Management Services Division of Retirement Tallahassee, Florida
12:00 p.m.	Conference Adjourns

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