



**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 - "Board Governance"** | Paul Guebert, *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' Pension 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 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

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| 7:15am:            | <b>Registration Opens</b>   Athena Ballroom Pre-Function                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 7:15am – 8:40am:   | <b>Breakfast</b>   Athena Ballroom G                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 8:25am – 8:40am:   | <b>Breakout Session:</b><br>"Introduction to the DCPF™ Course"   DCPF™ Subcommittee                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| 8:40am – 9:30am:   | <b>Breakout Sessions:</b><br><b>7B - "Equity Market Fundamentals"</b>   Megan Anderson, Winslow Capital<br><b>7A - "Evaluation of Service Providers and the RFP Process"</b>   Chris Reynolds, U.S. Bancorp Asset Management<br><b>8CE - "Bond Management 2.0: How the Next Generation of Bond Portfolios is Being Influenced by Technology &amp; AI"</b>   Rob Williams, Sage Advisory Services<br><b>1DC – "Foundations of Defined Contribution (DC) Plans"</b>   Weston Lewis, Callan LLC                                                                  |
| 9:30am – 9:50am:   | <b>Morning Break</b>   Sponsored by Wolf Popper   Athena Ballroom Pre-Function                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 9:50am – 10:40am:  | <b>Breakout Sessions:</b><br><b>8B - "Understanding Fixed Income Markets"</b>   Matt Boden, BCM Fixed Income<br><b>8A - "Public Retirement Plans Regulatory Environment"</b>   Caroline Dorsey, Seyfarth Shaw LLP<br><b>9CE - "Plan Sponsor Only Roundtable Discussion"</b>   Tim Milligan, Georgia Firefighters' Pension Fund   Athena Ballroom G<br><b>2DC – "Plan Governance and Fiduciary Responsibilities"</b>   Matt Nowak, Marquette Associates                                                                                                        |
| 10:50am – 11:40am: | <b>Breakout Sessions:</b><br><b>9B - "Beyond Traditional Allocation: Alternative Investments"</b>   Laura Stolfi, Churchill Asset Management<br><b>9A - "A Deep Dive into the Consultant Report"</b>   David Barnes, NEPC<br><b>10CE - "Actuarial Assumptions, Funding Concepts, and Retirement Plan Design"</b>   Malichi Waterman and Robert Burrell, Segal<br><b>3DC – "Investments and Participant Communication"</b>   Yaniv Rubina, OpenArc                                                                                                             |
| 11:40am – 12:35pm: | <b>Networking Lunch</b>   Sponsored by Nuveen   Athena Ballroom G(FH)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 12:40pm – 1:30pm:  | <b>Breakout Sessions:</b><br><b>10B - "Asset Allocation Essentials"</b>   John Sherman, Federated Hermes<br><b>10A - "Establishing a Rate of Return Assumption"</b>   Joe Griffin, Foster & Foster<br><b>11CE - "A Fresh Look at Asset Allocation"</b>   Christopher Gibson, Atlanta Capital<br><b>4DC – "Contributions, Eligibility, and Participant Management"</b>   Lawson Hauptfuhrer and Kyle Kane, T. Rowe Price                                                                                                                                       |
| 1:40pm – 2:30pm:   | <b>Breakout Sessions:</b><br><b>11B - "Your Consultant and Performance Evaluation"</b>   Ian Janecek, CBIZ<br><b>11A - "Pension Plan Funding and Managing Unfunded Liabilities"</b>   Lawrence Watts, Jr., Nyhart<br><b>12CE – "Recent Development (and Challenges) in Alternatives in Georgia"</b>   Kevin Campbell, Taurus Private Markets, Ashley Wolff, Ares Management and Morgan Wurst, Georgia Firefighters' Pension Fund (Panel Moderator)<br><b>5DC – "Plan Operations, Loans, Distributions, and Compliance Testing"</b>   Matson Hutchins, Mariner |
| 2:30pm – 2:50pm:   | <b>Afternoon Break</b>   Sponsored by Wolf Popper   Athena Ballroom Pre-Function                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 2:50pm – 3:40pm:   | <b>Breakout Sessions:</b><br><b>12B - "Understanding Actuarial Concepts"</b>   Lisa Bjornson, Gallagher<br><b>12A - "Economic Cycles and Their Impact"</b>   Tyler Grumbles, Mariner<br><b>13CE – "Pension Hygiene"</b>   Eric Atwater, Aon<br><b>6DC – "Audits, Recordkeeping, Risk Management and Best Practices"</b>   Richard Reed, Segal                                                                                                                                                                                                                 |
| 3:50pm – 4:40pm:   | <b>Breakout Sessions:</b><br><b>Basic Course Review Session (Day 2)</b>   CRPF™ Leadership Team<br><b>Advanced Course Review Session (Day 2)</b>   CRPF™ Leadership Team<br><b>14CE - "The Evolving Landscape of U.S. Infrastructure Financing"</b>   Matt Woods, DWS<br><b>DCPF™ Course Review Session</b>   DCPF™ Subcommittee                                                                                                                                                                                                                              |
| 4:45pm – 6:00pm:   | <b>Networking Reception</b>   Sponsored by Robins Geller Rudman & Dowd   Parthenon                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 6:00pm:            | <b>Dinner on Your Own</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

## WEDNESDAY | SEPTEMBER 30, 2026

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| 7:30am – 9:30am: | <b>Continental Breakfast Available</b>   Athena Ballroom G(HI)                                                                                                                   |
| 8:00am:          | <b>Course Exam Check-In</b>   Athena Ballroom Pre-Function                                                                                                                       |
| 8:00am – 9:30am: | <b>CRPF™ Basic Course Examination</b>   Athena Ballroom F<br><b>CRPF™ Advanced Course Examination</b>   Athena Ballroom F<br><b>DCPF™ Course Examination</b>   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](mailto:info@gappt.org).

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