

# Ft. Lauderdale Police and Fire Retirement System

Investment Workshop  
Riverside Hotel  
620 East Las Olas Boulevard  
Fort Lauderdale, FL 33301

**Tuesday, January 14, 2020**

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| 10:00 am | <b>Opening Remarks</b><br><i>Speaker: Kenneth Rudominer, Chairman<br/>Fort Lauderdale Police and Fire Retirement System</i>        |
| 10:15 am | <b>Investment Program Overview</b><br><i>Speakers: CAPTRUST</i>  |
| 10:30 am | <b>Fixed Income: What's Next for Rates and Bonds?</b><br><i>Speakers: Agincourt, Boyd Watterson</i>                                |
| 11:00 am | <b>Growth and Value: Outlook for Active Equity</b><br><i>Speakers: Aristotle, Sawgrass, Eagle, Vaughan Nelson</i>                  |
| 11:45 am | <b>Working Lunch/Keynote Address</b><br><i>Speaker: James Nevels, Former Fed Chair of Philadelphia</i>                             |
| 12:45 pm | <b>Market Observations and Sector Rotation Trends</b><br><i>Speakers: Rhumblin, INTECH</i>   |
| 1:15 pm  | <b>International Equity: Valuations and Currency</b><br><i>Speakers: Dodge &amp; Cox, Lazard</i>                                   |
| 1:45 pm  | <b>Alternative Investments' Role in a Diversified Portfolio</b><br><i>Speakers: EnTrust, Invesco, Lazard Global Infrastructure</i> |
| 2:30 pm  | <b>Break</b>   |
| 2:45 pm  | <b>Real Estate Outlook</b><br><i>Speakers: American Realty, Prudential</i>   |
| 3:15 pm  | <b>Alternative Income: A Search for Yield</b><br><i>Speakers: Boyd Watterson, Bloomfield Capital, Capital Dynamics</i>             |
| 4:00 pm  | <b>Wrap-Up Discussion &amp; Closing Remarks</b><br><i>Speakers: CapTrust, All Managers</i>   |
| 4:15 pm  | <b>Adjourn</b>   |