



**Florida West Coast Operating Engineers
Apprenticeship Trust Fund**

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A G E N D A

**MEETING OF THE
BOARD OF TRUSTEES
OF THE
FLORIDA WEST COAST OPERATING ENGINEERS
APPRENTICESHIP TRUST FUND
August 12, 2026**

- I. Call to Order
- II. Minutes – Board of Trustees Meeting, May 13, 2026 (Pg. 1-10)
- III. Investment Consultant's Report – Tony DuBose, Modern Wealth Management
- IV. Auditor's Report – Krista Bates, Bates CPA & Advisors
- V. Apprenticeship Director's Report – Adrian Lacey
- VI. Attorney's Report – Kathleen Phillips, Phillips, Richard & Rind
- VII. Administrative Manager's Report – Jeff Ianniello, Associated Administrators (Pg. 11-19)
- VIII. Other Fund Business
- IX. Next Meeting Date: November 11, 2026
- X. Adjournment