



**South Florida Operating Engineers
Apprentice & Training Fund**

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A G E N D A

**MEETING OF THE
BOARD OF TRUSTEES
OF THE
SOUTH FLORIDA OPERATING ENGINEERS
APPRENTICE AND TRAINING FUND
November 9, 2023**

- I. Call to Order – Trustee Appointment
- II. Minutes – Board of Trustees Meeting, August 10, 2023 (Pg. 17-24)
- III. Auditor’s Report – Dina Bellows-Levine, Bellows Associates
- IV. Investment Consultant’s Report – Tony DuBose, Legacy Wealth Management
- V. Apprenticeship Director’s Report – Michael Smith
- VI. Attorney’s Report – Kathleen Phillips, Phillips, Richard & Rind
- VII. Administrative Manager’s Report – Jeff Ianniello, Associated
Administrators (Pg. 25-37)
- VIII. Other Fund Business
- IX. Next Meeting Date:
 - February 15, 2024
 - May 9, 2024
 - August 15, 2024
 - November 14, 2024
- X. Adjournment