



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

911 Ridgebrook Road
Sparks, MD 21152-9451

Phone: 877-291-2387

www.associated-admin.com

A G E N D A

**MEETING OF THE
BOARD OF TRUSTEES
OF THE
SOUTH FLORIDA OPERATING ENGINEERS
APPRENTICE AND TRAINING FUND**

February 9, 2023

- I. Call to Order**
- II. Minutes – Board of Trustees Meeting, November 10, 2022 (Pg. 20-29)**
- III. Investment Consultant’s Report – SEI Global Institutional Group**
 - **RFP Results**
 - **Steven Zborowski – Evershore Financial Group**
 - **Tony DeBose – Legacy Wealth Management**
 - **Tom Bucha**
- IV. Apprenticeship Director’s Report – Michael Smith**
- V. Attorney’s Report – Kathleen Phillips, Phillips, Richard & Rind**
- VI. Administrative Manager’s Report – Jeff Ianniello, Associated Administrators (Pg. 30-42)**
- VII. Other Fund Business**
- VIII. Next Meeting Date:**
 - **May 11, 2023**
- IX. Adjournment**