



**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
May 14, 2026**

- I. Call to Order
- II. Minutes – Board of Trustees Meeting, February 12, 2026 (Pg. 19-25)
- III. Investment Consultant’s Report – Tony DuBose, Legacy Wealth Management
- 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. 26-36)
- VII. Other Fund Business
- VIII. Next Meeting Date:
 - August 13, 2026
- IX. Adjournment