



**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
August 10, 2023**

- I. Call to Order
- II. Minutes – Board of Trustees Meeting, May 11, 2023 (Pg. 18-24)
- 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: November 9, 2023
- X. Adjournment