



**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
August 21, 2025**

- I. Call to Order
- II. Minutes – Board of Trustees Meeting, May 15, 2025 (Pg. 17-24)
- 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. 25-35)
- VII. Other Fund Business
- VIII. Next Meeting Date: November 13, 2025
- IX. Adjournment