



1501_659

Quarterly Investment Performance Upgrade for Board Review

Investigate the mandatory reporting obligations outlined in the Public Funds Investment Act (PFIA), including the essential components stipulated by law for inclusion in these reports. Additionally, analyze exemplary approaches to presenting the required information, consider the optimal timing for delivering these reports, and address strategies for situations where there are either no existing investments or only minimal investments to report. Furthermore, examine the advantages of incorporating visual aids, such as graphics, to facilitate comprehension and interpretation of the data by reviewers. This training session offers two continuing education credits for professionals already certified through TASBO, CPA, school board members, charter school administrators, TESA STEM participants, and certified educators.

Thursday, August 1st, 2024 | 2:00PM

Presented by: David Webb, RTSBA, CPA

Target Audience: Accounting, Finance, Internal Audit, Budget, Investment Officer, Management

FEE: \$80 | \$135 Non-Member

CEU/CPE Hours: 2.0

About TASBO Webinars: Handouts will be distributed via email a day prior to the event—no prerequisites are required to register.

Zoom: This webinar will be presented on Zoom, and you will receive a link once registration is processed.

ABOUT TASBO EVENTS: Seating is limited, so register early. If you or (someone attending with you) need ADA assistance to participate, please call us at 512-462-1711.

CANCELLATION POLICY: **Cancellations are only accepted in writing.** Cancellations received seven (7) working days before the event are cancelled in full, those received one (1) to six (6) working days before the event are cancelled at 50 percent, and cancellations are not accepted the day of or after the event. If you do not cancel and/or do not attend, you are still responsible for payment. If TASBO cancels an event, you will be refunded in full.

Register online at [TASBO.org](https://tasbo.org) or return completed form by:

Mail: 5920 W. William Cannon, Building 1, Suite 200, Austin, TX 78749

Fax: 512.462.1782

Email: register@tasbo.org (DO NOT email Credit Card info)

Please PRINT clearly.

Name: _____ Title: _____

District/Employer _____

Contact Phone: _____ Email: _____