



## School Finance Council & Gulf Coast TASBO Agenda for Bond Conference Friday, April 7th, 2017 Register Here → 10905

HCDE – 6300 Irvington Blvd., Houston, TX 77022 (713) 696-8249

SFC Meetings are at no cost to TASBO ISDs and School Finance Council

Technical CPA Course Course ID# SFC-7 CPE hrs: 4.0 No Pre-requisites required for this training

- I. Welcome and Introduction 8:45 9:00 AM Jesus J. Amezcua, RTSBA, CPA, Ph.D. Asst. Supt. Business HCDE
- II. Updates on School Finance David Marx, Director Financial Compliance
  9:00 AM to 10:00 PM
  Learning Objectives: Participants will learn about the updates on
  school finance and FIRST from TEA.
- III. Negotiation Strategies and Techniques and School District
  Employment Contracts John Kazen, Kazen Muerer and Perez, LLC
  Partner

10:00 AM to 11:00 PM

**Learning Objectives**: Participants will learn about negotiation techniques with contractors and others as well as employee contracts.





- II. Bond Rating Agencies Panel 11:00 to 12:00 AMOverview of rating agency and then Q&A.
  - Sarah Jensen, Moody's Investor Service

**Learning Objectives**: Participants will learn about latest issues regarding bond ratings and information.

Iv. School Facilities Funding Update – Cassie Huggins, TEA
 12:00 AM to 12: 30 PM Learning Objectives:
 Participants will learn about school funding for facilities.

V.

VI. Bond Professional Panel 12:30 - 1:30 PM
Learning Objective: Participants will learn about continuing disclosure process and new rules regarding 15c2-12 disclosure.

Moderator: Duane Westerman, Financial Advisor – SAMCO The panel will include:

- Jeffrey Kuhn, Norton Rose Fulbright
- o David Cisarik, Coastal Securities
- Rudy Mejia, Estrada Hinojosa and Company

Lunch and Reflections (Served at 12:00 pm – sponsored by HCDE)

Evaluations will be required at the end of the 4.0-hour session. CPE/CEU Certificates will be available at the end of the session. Additional resources will be made available after the session.