

School Finance Council & Gulf Coast TASBO

Agenda

Thursday, July 7 2016

https://workshops.hcde-texas.org/v20_prod//emc00/PublicSignIn.aspx?OrgCode=10&EvtID=5186&CC=115103017865&DictSeq=27&Lang=*&AppCode=REG&CultureInfo=en-US

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-1 CPE hrs: 4.0
No Pre-requisites required for this training

- I. **Welcome and Introduction** **8:45 – 9:00 AM**
Jesus J. Amezcua, Ph.D., CPA, RTSBA, Asst. Supt.
Business – HCDE

- II. **Chris Jamail, TCG Group Holdings, LLP** **9:00-10:00 AM**
An update on state and national benefits items and the investment of fund balances - use of fixed income strategies under the Texas Government Code to increase interest earnings.
Learning Objectives: Participants will learn about strategies on benefits and investments.

- III. **Stephanie Maher, Attorney Rogers, Morris and Grover LLP.** **10:00– 11:00 AM**
Practical tips of navigating the TPIA- Texas Public Information Act.
Learning Objectives: Participants will learn about compliance issues with TPIA.

IV. Cooper Castleberry, Managing Partner, ArbiterPay Texas, LLC
11:00 – 11:30 AM

Solutions in handling athletic payments to officials.

Learning Objectives: Participants will learn about the solutions to handle athletic payments to officials (umpires, etc).

Break and network

V. Michelle Faust, Vice President NAS – North American Solutions
11:30 – 12:00 PM

After School Activities: How to Limit Your Exposure- a Risk management strategy

Learning Objectives: Participants will learn about risk management strategies to prevent losses.

VI. Roy Lanier, Consultant – Lanier Enterprise and Consultants
12:00 PM to 1:00 PM

Update on E-rate changes and applications

Learning Objectives: Participants will learn about E-rate grant programs and processes.

**Lunch and Reflections (served at 12:00 pm – sponsored by
NAS – North American Solutions)**

**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**

Stephanie E. Maher

Attorney

Rogers, Morris & Grover, L.L.P.

T: 713-960-6037

Email: smaher@rmgllp.com

Ms. Maher focuses her practice on the representation of public and private sector employers in purchasing, procurement, governance, open government, and litigation. Ms. Maher is admitted to practice in Texas and before the U.S. District Courts for the Southern, Eastern, Northern, and Western Districts of Texas, and the United States Court of Appeals for the Fifth Circuit. Prior to joining Rogers, Morris & Grover, L.L.P., Ms. Maher served as a judicial clerk to Justice Harvey Brown of the Texas Court of Appeals, First District.

Education and Honors

Baylor Law School, J.D., *Cum Laude*, 2010

The University of Texas at Austin, B.A. History and Plan II Liberal Arts Honors, High Honors, 2007

Affiliations

State Bar of Texas.

Presentations & Trainings

- *EDGAR's Greatest Hits: The Top 5 Things You Need to Know*
- *Texas Subpoenas: State, Federal, Civil, Criminal and Everything in Between*
- *Ethics in Schools: Boundaries and Appropriate Use of Social Media*
- *Mental Health at School*
 - *The Ins and Outs of Student Confidentiality*



Michelle Faust

Bio

Vice President, North American Solutions

Michelle Faust joined North American Solutions as vice president in 2016. Her responsibilities include program administration, risk management resources and new business development. Michelle's career includes over 25 years of experience in risk management and 15 years in the public sector.

After earning her B.S. in business at Clemson University, she began her insurance career with a focus in loss control and risk management. She gained unique experience as the risk manager for one of the largest privately held city/athletic/county club companies.

Shifting her focus toward the public sector, Michelle served as the risk manager for Austin Community College for two years before becoming the director of safety & risk management at Round Rock ISD. Working at this fast growth school district for 15 years gave Michelle the skills and experience required to support a wide range of public education risk services.

Michelle was a founding board member of Property Casualty Alliance of Texas, one of the largest public school risk pools in the U.S., where she served for over 10 years. She is an Associate in Risk Management (ARM) and a Chartered Property Casualty Underwriter (CPCU). She is one of the first in Texas to become a Certified School Risk Manager (CSR).

Cooper Castleberry

BIO:

I am a retired small business owner. My dad and I owned and operated a retail furniture store in Lufkin for 50 years. I am a graduate of Lufkin High School and served on the Lufkin ISD school board from 2000 through 2012. During that tenure, the LISD board was chosen by TASB as the School Board of the Year and I was the president of the board from 2008-2010.

I have been a football official since 1978 and have been officiating at the collegiate level since 1994. I worked in the Southland Conference from 1994 through 1998; the Western Athletic Conference from 1999 through 2001 and am presently working in the Big 12 Conference since 2002. I have worked 16 collegiate bowl and playoff games including the 2008 FCS National Championship.

I am a past president of TASO-Football and was instrumental in solving the issues between the UIL and TASO by working closely with the UIL Director of Officials, Tony Timmons. I am currently the UIL Football Rules Interpreter.

Cooper Castleberry

Managing Partner

ArbiterPay Texas, LLC

www.ArbiterPayTexas.com

P- [\(936\) 635-3529](tel:(936)635-3529)

F- [1-\(512\) 842-7136](tel:1-512-842-7136)

Chris J. Jamail, CFP®

Biography

Chris Jamail is the Chief Operations Officer and Chief Investment Officer of TCG Advisors, LP (TCG Advisors), a subsidiary of TCG Group Holdings, LLP in Austin, Texas. He oversees the operations of TCG Advisors and the investment strategies used by TCG Advisors' individual and institutional retirement plan clients. TCG Advisors manages over one billion dollars in retirement plan and individual investment assets.

Chris also specializes in working with clients in the public sector, particularly with school districts, superintendents and other school administrators. He frequently gives presentations to school districts and administrator organizations nationally, focusing on educating them about retirement planning issues and how to maximize benefits in state retirement systems.

Chris earned a BBA in Marketing from Texas A&M University and started his professional career in 2002 with TCG Benefits, a subsidiary of TCG Group. He earned the Certified Financial Planner™ designation in 2010.

Chris Jamail is a Partner in TCG Group Holdings, LLP (TCG Group). TCG Group provides retirement and employee benefit plan administration, consulting and investment advisory services to public school districts, community colleges, and other public/nonprofit organizations, as well as private sector companies across the nation.

TCG Group Holdings, LLP
900 S. Capital of Texas Highway, Suite 350
Austin, TX 78746
Phone 512-306-9939; Fax 737-704-0435
Cell 512-415-2854
Email: mcochran@tcggroupholdings.com
Website: www.tcgservices.com

For registration questions, please email drubio@hcde-texas.org