

Public Funds Investment Act

Training Workshop
Thursday, May 12, 2016
Houston, TX

Agenda

- 9:00 – 10:00** **Economic Update** – Richard Long, Valley View Consulting
- 10:00 – 10:15** **Break**
- 10:15 – 11:45** **Public Funds Investment Act Compliance** – Richard Long
- 11:45 – 1:00** **Lunch**
- 1:00 – 2:00** **MMMFs, Investment Pools, and the SEC** – Richard Long
- 2:00 – 3:00** **Market Risk** – Richard Long



This workshop is presented by the Center for Public Management at the University of North Texas and the Government Treasurers' Organization of Texas (GTOT). The Center for Public Management is the professional development arm of the Department of Public Administration.

The Department of Public Administration offers a Masters of Public Administration degree with specializations in financial management, local government management, emergency administration and planning, and personnel management. Program graduates hold leadership positions in government agencies as well as the private and non-profit sectors. In Texas, more city executives (city managers, deputy city managers and assistant City managers) hold a master's degree from UNT than any other university. In its most recent rankings, U.S. News and World Report rated the UNT Public Administration program 8th nationally and First in Texas in city management and urban policy.

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| 9:00 – 10:00 | Financial Institution Deposits – Richard Long, Valley View Consulting |
| 10:00 – 10:15 | Break |
| 10:15 – 11:45 | Investment Pools – Richard Long |
| 11:45 – 1:00 | Lunch |
| 1:00 – 2:00 | Second Tuesdays: A Monthly Plan – Richard Long |
| 2:00 – 3:00 | Integrating Technology and Investing – Richard Long |

Trainers

Richard Long – Valley View Consulting

Richard Long has over 30 years' experience in public and private funds management. He is the founder and manager of Valley View Consulting, L.L.C., a Securities and Exchange Commission-registered investment advisor. Dick provides funds management services to public entities, including developing investment policies and strategies, analyzing investment alternatives, and interpreting market trends. In various previous positions, he served as head of First Southwest Company's public funds management program, originated corporate, asset backed and tax-exempt securities, managed a government trading operation, and distributed both public and private securities. Mr. Long also previously served on a part-time basis as Chief Investment Officer for Estrada Hinojosa & Company, Inc. He is a frequent speaker at seminars sponsored by the Texas Municipal League, the Government Finance Officers Association of Texas, and the Government Treasurers' Organization of Texas. Dick graduated from Colorado State University with a BA in Finance and holds an MBA degree from the University of Dallas.

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