

Public Funds Investment Act

Training Workshop
Friday, May 13, 2016
Houston, TX

Agenda

- 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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