

CGFOA Education Session

Developing and Updating Investment Policies and Procedures

Monday, August 23rd, 8:30 AM - 3:30 PM - Littleton, CO

- **Course Description:**
The session will be a very interactive learning experience focused on the fiduciary duty of finance officers, the key elements needed in the investment policy and procedures to fulfill one's fiduciary duty and how to make the policy and procedures effective risk management tools. The instructor will facilitate a lively discussion drawing on the participants' own experiences and challenges.
- **Major Topics Covered in the Course:**
 - What fiduciary duty is.
 - How the policy and procedures are risk management tools.
 - What key elements need to be in an investment policy and procedures.
 - Should investment policy and procedures language be revised because of recent market turmoil.
 - Are there new best practices to incorporate into the investment policy and procedures.
- **Learning Outcomes:**
The participants will have a better understanding of how to use an investment policy and procedures as risk management tools.
- **The Instructor:** Ned Connolly is senior vice president for Chandler Asset Management, an investment advisory firm specializing in the management of public funds, headquartered in San Diego with offices in Colorado. He has twenty-four years experience in the investment industry in the areas of institutional fixed-income investing and portfolio management. He has assisted public entities in Colorado and throughout the country develop and implement sound and successful investment programs and practices. Mr. Connolly is a member of the Government Finance Officers Association's Committee on Treasury and Investment Management. He has been an instructor and speaker on various investment topics for the GFOA; CGFOA; Association for Public Treasurers; California Debt and Investment Advisory Commission; and numerous state and regional associations.

Attendee Name: _____

Title: _____ Entity Name: _____

Address: _____ City, St, Zip: _____

Phone: _____ Fax: _____

E-Mail: _____

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A registration confirmation will be emailed to you which will contain exact address location. Confirmations are sent after you register and about 1 week prior to the seminar. If you do not receive a faxed confirmation by 5 days prior to the event—you should assume you are not registered and call the office.

Check enclosed for: _____ or CC # _____ Exp. Date: ___/___/___ CVV: _____

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If you have any questions—please contact the CGFOA office—(303) 922-4647.

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