



**Board of School Trustees
Mansfield Independent School District**

DATE: July 22, 2025

TITLE: Consideration and Approval of Investment
Broker/Dealer Authorized List

ACTION

BACKGROUND:

In accordance with the 1997 Public Funds Investment Act, Texas Government Code 2256.025, the Board of Trustees must review, revise, and adopt a list of qualified brokers and dealers on an annual basis.

CONSIDERATIONS:

The following is the list of brokers and dealers that Mansfield ISD Administration will utilize during 2025-2026:

UBS PAINE WEBBER	Dick Ebert	1001 Woodlock Forest Dr, The Woodlands, TX 77380
RAYMOND JAMES	Phil Hartigan	1130 North Carroll Ave., Ste 100, Southlake, TX 76092
MULTI-BANK SECURITIES	Joe Maxwell	13062 Hwy 290, #111 Austin, TX 78737
A J CAPITAL	Anne Jenkins	24915 Baywick Dr Spring, TX 77389
FROST BANK	Javier Vielma/Cody Hundley	100 West Houston San Antonio, TX 78205
WELLS FARGO SECURITIES, LLC	Chuck Landry	MAC T9216-048 1445 Ross Ave, Suite 420 Dallas, TX 75202
HILLTOP SECURITIES		1201 Elm Street, Suite 3500 Dallas, TX 75270
FHN FINANCIAL	Buddy Saragusa	920 Memorial City Way 11th Floor Houston, TX 77024

RECOMMENDATION:

That the Board of Trustees adopts the authorized list of investment brokers for 2025-2026.