

Spring Branch Independent School District

Agenda Item Information

Date of Board Meeting: September 28, 2026

Subject: Request for Approval of the Resolution of Annual Review of Investment Policy of
Spring Branch ISD

Administrator Responsible:

Name: David Bender

Position: Associate Superintendent for Finance

Purpose of Agenda Item: Consent

ADDITIONAL INFORMATION AND/OR BACK-UP:

Attached is the Resolution for the Annual Review of Investment Policy, as required by the Public Funds Investment Act, Chapter 2256.005 (e) and 2256.025

"The governing body of an investing entity shall review its investment policy and investment strategies not less than annually. The governing body shall adopt a written instrument by rule, order, ordinance, or resolution stating that it has reviewed the investment policy and investment strategies and that the written instrument so adopted shall record any changes made to either the investment policy or investment strategies".

"The governing body of an entity subject to this subchapter or the designated investment committee of the entity shall, at least annually, review, revise, and adopt a list of qualified brokers that are authorized to engage in investment transactions with the entity".

Copies of CDA (Legal) and CDA (Local), a listing of investment broker/dealers, and a listing of investment training providers is attached. The Spring Branch ISD investment policy is in full compliance with state law as written. We recommend no changes to the policy.