Belton Independent School District

Board of Trustee Meeting Agenda Item

September 21, 2026

Item: Resolution Adopting Authorized Broker/Dealer List

Contact Person: Melissa Lafferty

Presented for: ☑ Action ☐ Report Only

Supporting Documents: ☐ None ☑ Attached ☐ Provided Later

District Priority or Strategic Objective:

Priority 4: Fiscal Management – Maximize student experiences through transparent, strategic, and sustainable fiscal management.

Background Information:

In accordance with the Public Funds Investment Act, Texas Government Code 2256.025, the Board of Trustees must adopt a list of qualified brokers that are authorized to engage in investment transactions with the district.

The District has consulted with Meeder Public Funds to assist in maintaining the broker list and these firms shall submit documentation as required by Board Policy CDA(LEGAL) attesting that they (1) have received and reviewed the District's investment policy and (2) acknowledged that they have implemented reasonable procedures and controls in an effort to preclude investment transactions conducted between the District and the organization that are not authorized by the District's policy.

Fiscal Implications:

None.

Administrative Recommendation(s):

Approve the resolution for the authorized broker/dealer list as presented.