

Collin College
Budget & Finance Committee
April 26, 2016

Agenda Item 3. Update on Investment Advisor

| | |
|--------------------|---|
| March 22, 2016 | Board Authorization for District President to Negotiate Contract <\$70K |
| April 1, 2016 | Contract signed effective April 1, 2016 (1 year plus one 2 year renewal) at \$33K annually |
| April 8, 2016 | Meeting re: processes and procedures – Collin College and P&A Patterson new client checklist |
| April 9 – 20, 2016 | Gathering and submitting documents and authorizations |
| May 24, 2016 | 1 st reading Policy CAK (Local) – Investments |
| June 28, 2016 | 2 nd reading Policy CAK (Local) – Investments |