



Bastrop ISD
Board Agenda
July 15, 2025

Item # 2-B

SUBJECT: Amended Investment Training Providers List

PRESENTOR: Mike White, Chief Financial Officer

LENGTH OF PRESENTATION: Consent agenda, no presentation

DISTRICT MANAGEMENT – Fiscal Management

The Public Funds Investment Act (PFIA), Chapter 2256 of the Texas Government Code, governs the rules and regulations regarding the District's investment of funds. The District is required to invest its funds in accordance with PFIA and provide guidance to potential investors with respect to the types and amounts of allowable instruments.

The Board is required to annually review the District's investment policy and approve a Resolution regarding the review of the Investment Policy as well to obtain Board of Trustee approval of authorized investment brokers. In addition, as part of adoption of investment policy review the Board is to adopt the list of investment training providers. This action was taken in November 2024. Administration is recommending on amendment to the list of investment training providers to include Texas State University.

RECOMMENDATION: I recommend the Board approve the amended List of Investment Training Providers as presented.