



Board Agenda

Item: VI. B. 2. Review and Approve Investment Policy

Page 28-33

Related goal(s): Ensure effective and efficient quality systems

Currently budgeted? Yes ☒ No ☐ **Budgetary impact**

Action ☒ **Report** ☐

Primary Contact Person: Mr. Richard Koonce

Policy CDA Local, (the District Investment Policy) requires an annual review of the investment policy and a report to the Board by the District's Investment Officers. We have Scott McIntyre with First Southwest to review our policy to confirm that we are in compliance with the Public Funds Investment Act. We recommend no changes to our current policy CDA Local.