



Board of Trustees Agenda Item

Date:	September 15, 2025
Agenda Item	2025-2026 Broker Dealer Resolution
Policy Reference	CDA (Legal / Local)
Strategic Goal	Fiscal Responsibility
Department	Finance Division

Recommendation

The Superintendent recommends the Board of Trustees approve the 2025-2026 Broker Dealer Resolution as presented.

Summary

The board or the designated investment committee shall, at least annually, review, revise, and adopt a list of qualified brokers who are authorized to engage in investment transactions with the district. *Gov't Code 2256.003(a)*

Rationale

Approving multiple brokers allows the district to competitively price investments ensuring safety of principal, maintain liquidity and to maximize financial returns within current market conditions.

Recommended by: Dr. Kristin Craft - Superintendent

Submitted by: Wesley Scott – Chief Financial Officer

Suggested Motion

The Board of Trustees approve the 2025-2026 Broker Dealer Resolution.