



UNITED INDEPENDENT SCHOOL DISTRICT AGENDA ACTION ITEM

TOPIC _____ Resolution regarding Review of Investment Policy and Strategies _____

SUBMITTED BY: _____ Samuel D. Flores _____ **OF:** _____ Division of Finance _____

APPROVED FOR TRANSMITTAL TO SCHOOL BOARD: _____

DATE ASSIGNED FOR BOARD CONSIDERATION: _____ December 18th, 2024 _____

RECOMMENDATION:

To approve resolution indicating that United ISD Board of Trustees received and reviewed the District's investment policy and strategies, list of qualified brokers and list of investment training sources as required by the Public Investment Act and Untied ISD Investment Policy.

RATIONALE:

In order to comply with Public Funds Investment Act and District policy, the Board of Trustees should annually review the District's investment policies and strategies, list of qualified brokers and training sources.

BUDGETARY INFORMATION:

N/A

BOARD POLICY REFERENCE AND COMPLIANCE:

CDA (LEGAL) Other revenues: Investments