



## Board of Trustees Agenda Item

**Meeting Date:** June 8, 2026

**Agenda Item:** Act on annual review of the District's investment policy CDA (Local)

**Item Type:**

- New
- Update/Revision
- Continuation/Renewal
- Mandated Action

**Item Purpose:**

- Information
- Recognition
- Student Learning & Support
- District Business & Operations
- Board Policy & Compliance
- Other \_\_\_\_\_

**Submitted By:**

Kimberly Smith

**Background Information:**

Policy CDA (Legal) requires the Board to review its investment policy and investment strategies annually. The attached annual investment policy review letter from the district's asset managers, Hilltop Securities Asset Management Group (HSAM), recommends no changes at this time. FISD Investment Officers concur.

**Budget Consideration:**

**Expenditure Amount:**

N/A

**Expenditure Type:**

- Recurring
- One-Time
- Budgeted
- Unbudgeted
- N/A

**Funding Source:**

- General Fund
- Child Nutrition Fund
- Capital Fund
- Grant Fund
- Other: \_\_\_\_\_
- N/A

**Budget Owner:** N/A

**Supporting Documentation:**

Frisco ISD Review of Investment Policy Ltr 2026.pdf  
Investment Policy Certification 2026-Frisco ISD.pdf

**Recommendation:**

We recommend a motion to renew the District's investment policy CDA (Local) as written.

**Comments:**