



# UNITED INDEPENDENT SCHOOL DISTRICT AGENDA ACTION ITEM

**TOPIC:** Resolution regarding Review of Investment Policy and Strategies

**SUBMITTED BY:** Felipe J. Jimenez **OF:** Fiscal Operations Department

**APPROVED FOR TRANSMITTAL TO SCHOOL BOARD:**

**DATE ASSIGNED FOR BOARD CONSIDERATION:** December 17, 2025

**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 Pubic Investment Act and United 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