



Board of Trustees Agenda Item

Staff Member Name:

Kimberly Smith

Department:

Business Services

Board Meeting Date:

June 9, 2025

Agenda Heading:

Act on list of approved broker-dealers

Item Type: Action Item

Background Information:

Policy CDA(Legal) requires the Board to, at least annually, review, revise, and adopt a list of qualified brokers that are authorized to engage in investment transactions with a district.

Amount (when applicable): N/A

Recommendation:

We recommend a motion to approve the list of authorized brokers as present.

Comments:

The attached broker/dealer list has been vetted and approved by Hilltop Asset Management Group (HSAM), which is engaged as the District's asset manager. All brokers included on the list meet the criteria necessary to engage in investment transactions with public school districts.