

# McCall Gibson Swedlund Barfoot PLLC

Certified Public Accountants

## Investment Training for Local Governmental Entities

### McCall Gibson Swedlund Barfoot PLLC

## Public Funds Investment Act Seminar for Local Governmental Entities

### Saturday, October 21, 2017

Sheraton North Houston  
at George Bush Intercontinental

15700 John F. Kennedy Blvd., Houston, Texas 77032  
Sheraton North Houston's phone number: 281.442.5100



www.mgsbpllc.com

### REGISTRATION

The 2001 Texas Legislation changed training requirements for most governmental entities to 6 hours of training within one year of assuming the position of investment officer. All investment officers must have an additional 4 hours training in each two year period after their initial 6 hours of training.

#### ROOM TEMPERATURES OFTEN VARY, PLEASE DRESS ACCORDINGLY.

**BASIC PLUS STANDARD PFIA TRAINING**  
**(6 hrs.) \$165 early registration**  
\$185 if registration is postmarked after 10/13/17

Sign in begins at 7:15 a.m.  
Fee includes continental breakfast and box lunch. Course time: 8 a.m. – 2 p.m.

**STANDARD PFIA TRAINING**  
**(4 hrs.) \$145 early registration**  
\$165 if registration is postmarked after 10/13/17

Sign in begins at 9:15 a.m.  
Fee includes box lunch. Course time: 10 a.m. – 2 p.m.

**THE SHERATON HAS PROVIDED A LIMITED NUMBER OF ROOMS FOR ATTENDEES ON 10/20/17 AT \$99 PLUS TAX. MAKE RESERVATIONS WITH THE SHERATON BEFORE 5 P.M., OCTOBER 6.**

Name: \_\_\_\_\_

Will attend the 6 hour session  OR Will attend the 4 hour session

PLEASE TYPE OR PRINT

Organization: \_\_\_\_\_

Title: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone No., Day: \_\_\_\_\_ Attendee's Cell or Evening: \_\_\_\_\_

*need for any last minute cancellation*

Attendee's e-mail: \_\_\_\_\_

*for confirmation and last minute cancellations*

Bookkeeping Firm: \_\_\_\_\_

*needed to invoice registrant*

**Registrations may be mailed to:** McCall Gibson Swedlund Barfoot PLLC  
**13100 Wortham Center Dr., Suite 235, Houston, TX 77065-5610**  
**or email:** dkflynn1@comcast.net **or fax:** 713.462.2708

Attendees and their district names are reported to the State Comptroller as per TX Water Code Chapter 36. Make payments by check or money order to the address above.

**No refunds will be made after October 13, 2017.**

**For additional information contact Diane Flynn by phone at 713.416.5226 or by email at: dkflynn1@comcast.net**

**CPE credits for CPAs:** The firm has registered with the Texas State Board of Public Accountancy as a CPE sponsor. There are no prerequisites for either course. Six CPE credits will be given for the Basic Course and four for the Standard Course. The courses are designed to meet the objectives required for PFIA training which include education in investment controls, security risks, strategy risks, market risks, diversification of investment portfolio and compliance with the PFIA. Additionally, the courses will give valuable insight into the current and future economic impact on investing. This registration does not constitute an endorsement by the Board as to the quality of our CPE program.



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**6 hour session starts at 8:00 a.m.**  
**4 hour session starts at 10:00 a.m.**

**General Directions to the Sheraton North Houston**

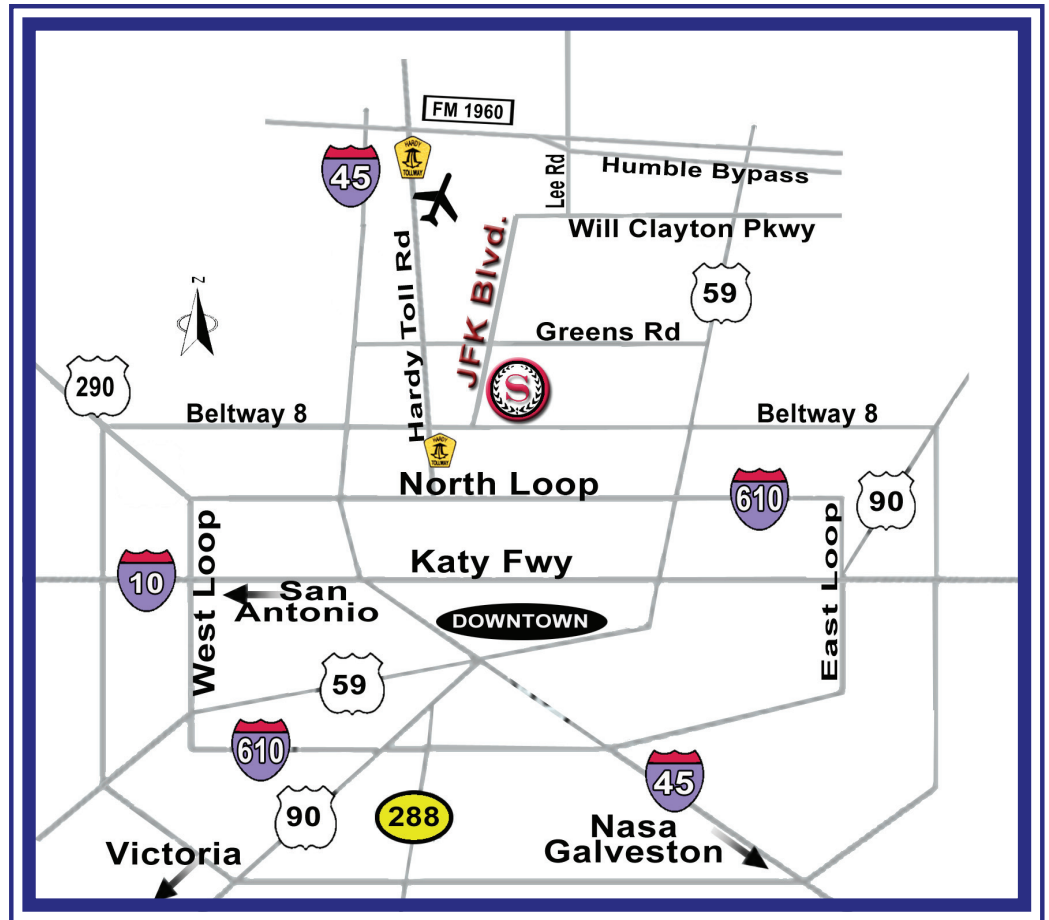
**From George Bush Intercontinental Airport -**  
Take JFK Blvd. south from the airport to the hotel.

**From Interstate 10 -** Exit I-45 North to Beltway 8, east on Beltway 8 to JFK Blvd. and go north.

**From Interstate 45 -** Exit at Beltway 8, east on Beltway 8 to JFK Blvd. and go north.

**From 610 West -** Exit at I-45, north to Beltway 8, east on Beltway 8 to JFK Blvd. and go north.

**From Sam Houston Tollway -** From the Sam Houston Tollway exit Beltway 8, east to JFK Blvd. and go north.



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