

McCall Gibson Swedlund Barfoot PLLC Public Funds Investment Act Seminar For Local Governmental Entities Saturday, October 15, 2022



Alia Vinson

Alia Vinson is a Partner with Allen Boone Humphries Robinson LLP and works with special purpose districts, such as municipal utility districts (including master planned communities), water authorities, local government corporations and management districts, both in the role of general counsel and bond counsel. She has a particular interest in long term water supply planning, water infrastructure development, water conservation and reuse projects, and the development of park and recreational facilities, including the Bayou Greenways project. Alia was admitted to practice in Illinois in 2002 and then in Texas in 2004, after graduating from the University of Chicago, The Law School (J.D. 2002).



Sandra Staine

Sandra is an Attorney with Allen Boone Humphries Robinson LLP. Her practice focuses on public finance, urban development law, and local government regulation. She works with special purpose districts, such as municipal utility districts and municipal management districts, both in the role of general counsel and bond counsel. Sandra has also served as bond counsel, underwriters' counsel, and disclosure counsel in tax-exempt bond financings for cities, counties, school districts, and special districts throughout Texas. Sandra was admitted to practice in Texas in 2015 after graduating from The University of Texas School of Law (J.D. with honors, 2015).



Linda T. Patterson, CTP

Linda T. Patterson, CTP is President of Patterson & Associates, an institutional money management firm founded in Austin, Texas in 1994. The firm serves public and private entities with full investment advisory services and cash management consultation and has over \$1 billion currently under management. Linda is an active contributor, teacher, lecturer and author throughout the nation. She is involved professionally at the state and national levels improving the field of treasury management as the founder and first President of the Government Treasurers' Organization of Texas (GTOT).



Robert W. (Bill) Gilmer

Bill Gilmer is Director of the Institute for Regional Forecasting in the University of Houston's Bauer College of Business. The institute focuses on developments in the Houston business cycle, monitoring the effects on the Gulf Coast region of the national economy, energy and global expansion. It also conducts other economic studies of policy significance to the Houston area. Before joining the Institute, Bill served for 23 years as a Senior Economist and Vice President of the Federal Reserve Bank of Dallas. He joined the Houston Branch of the Federal Reserve Bank of Dallas as a senior economist in 1989. Bill holds a M.A. and a Ph.D. in Economics from the University of Texas at Austin. He was born in Amarillo, Texas and grew up in El Paso where he earned a B.A. in economics from the University of Texas at El Paso.

Norris Conference Centers—Houston/CityCentre
816 Town & Country Blvd • Suite 210 • Houston, TX 77024

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McCall Gibson Swedlund Barfoot PLLC

www.mgsbpllc.com

McCall Gibson Swedlund Barfoot PLLC is a Texas CPA firm, concentrating on auditing services for local governmental and not-for-profit organizations. The company, formed on March 1, 1987, serves clients throughout Texas from offices in Houston and Austin. The owners of the firm are Christopher (Chris) J. Swedlund, CPA, Noel W. Barfoot, CPA and Joseph L. Ellis, CPA. The firm's memberships include the AICPA's Governmental Audit Quality Center, Government Finance Officers Association (GFOA), the Association of Water Board Directors-Texas (AWBD), the Texas Rural Water Association (TRWA), Capital Area Suburban Exchange (CASE) and the Texas State Association of Fire and Emergency Districts (SAFE-D). This is the 27th PFIA seminar since 1998 that the firm has organized to assist officials in meeting their training requirements.

Basic Session: The Basic Session is 6 hours and starts at 8 a.m. New investment officers will need to attend the full 6 hours to fulfill the training objectives of the PFIA.

Standard Session: The Standard 4 hour session starts at 10 a.m. and is designed to meet the objectives for renewing required PFIA training and give valuable insight into the current and future economic impact on investing.

Who should attend: Texas Legislation requires investment officers for most governmental entities to have 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. Anyone associated with a governmental entity is invited to attend this informative seminar.

Certificates: Certificates of course completion will be given to those attending the full sessions. Credit hours may be reduced for those participants who arrive late or leave early. Attendee names will be reported to the State Comptroller per Texas Water Code Chapter 36.

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.

REGISTRATION

Basic PFIA Training

(6 hrs.) \$175 early registration
\$200 if registration is postmarked after 10/7/2022
Sign-in begins at 7:15 a.m
Fee includes continental breakfast and box lunch
Course time: 8 a.m. - 2 p.m.

No refunds will be made
after October 7, 2022

Standard PFIA Training

(4 hrs.) \$155 early registration
\$180 if registration is postmarked after 10/7/2022
Sign-in begins at 9:15 a.m
Fee includes box lunch
Course time: 10 a.m. - 2 p.m.

Name: _____ Title: _____

Organization: _____

Address: _____

City: _____ TX Zip: _____

Daytime Phone: _____ Cell/Evening Phone: _____
(needed for event changes)

Attendee Email: _____
(for confirmation or event changes)

Bookkeeping Firm: _____
(needed to invoice registrant)

Mail registrations to:

McCall Gibson Swedlund Barfoot PLLC
13100 Wortham Center Dr., Suite 235
Houston, TX 77065-5610

Or email: mgsb@mgsbpllc.com
or fax: 713-462-2708

For additional information contact
Bessie Dycus at 713-462-0341 or
bdycus@mgsbpllc.com

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