



Speakers:

- Michelle Durgy, Senior Portfolio Manager, KCM Advisors
- Kenton McCarthy, CEO, Vulcan Consultants, LLC
- Vishal Thacker, Chief Investment Officer, Alameda County, CA
- Mike Solomon, Treasurer, City of St. Paul, Minnesota (Moderator)

Session Outline:

- 1) Introductions**
 - Topic
 - Speakers
- 2) The Basics**
 - Market Overview
 - Factors Influencing Public Sector Investment Portfolios
 - Importance of Investment Policies and Procedures
- 3) What's Ahead**
 - Strategies to Address Market Volatility and Stability
 - Proactive vs Reactive Investing
- 4) Communicating Market and Portfolio Information**
 - Presenting Market Information to Elected Officials
 - Your Portfolio and Benchmarks Thereto
 - Managing the Process

Learning Objectives:

Key takeaways and learning objectives for this session include:

- Learn about historical and future economic trends that impact government investment portfolios.
- Understand the need to have your investment program address both turbulent and consistent market conditions
- Become familiar with data points and information that are useful to assist with portfolio management.
- Develop key communication skills about presenting information to your elected body and other stakeholders.