

# AGENDA

## 2020 WSACT Summer Conference - Union (Mason County), WA

<b>Mon. June 8</b>	<b>Pre-conference Golf Tournament</b>	<b>Jeff Gadman, Thurston County Treasurer</b>
<b>Tues. June 9</b>	<b>Alderbrook Resort</b>	<b>Notes</b>
7:30 – 8:30	Breakfast for Conference Participants	Alderbrook Dining Room
9:00 – 9:30	Opening Ceremonies; Welcome	
9:30 – 10:30	Diane Campbell, Port of Seattle – Districts that are their own Treasurer	Pending – Wanda in contact
10:30 – 11:00	Break – Visit Vendors	
11:00 – 12:00	Dr. Steven Lerch – Washington Economic & Revenue Council	Confirmed with Desiree Monroy/Wanda 1.31.20
12:00 – 1:00	Lunch – Mason County’s History / Tribes?	Alderbrook Dining Room – Lisa to confirm
1:00 – 2:00	SAO – Pierce County Housing Authority Fraud	Confirmed by Wanda 1.21.20
2:15 - 3:00	Kris Mann, Land Title of Silverdale – Mobile Homes	Confirmed by Wanda unless last minute cancellation due to speaker’s relocation
3:00 – 3:15	Break – Visit Vendors	
3:15 – 4:30	Roundtable – Treasurers and Deputies – Foreclosure, Mobile Home, Distraint, and Other	Lisa Frazier and Chief Deputy
6:00 - ?	President’s Reception	Alderbrook Dining Room
<b>Wed. June 10</b>	<b>Alderbrook Resort</b>	
7:30 – 8:30	Breakfast for Conference Participants	Alderbrook Dining Room
9:00 – 10:00	DOR – Christine Marchesano – Tiered Excise and lessons learned; What has the legislature given us?	Confirmed by Wanda 1.31.20
10:00 – 11:00	Perspectives from the Washington State Treasurer Duane Davidson	Confirmed by Staci Ashe 12.30.19
11:00 – 12:00	State Treasurer’s Office – LGIP, Midterm and Core Portfolio – Staci Ashe, Jim Rosenkoetter	Confirmed by Wanda w/Staci 1.31.20
12:00 – 1:00	Lunch	
1:00 – 2:00	Dr. Brian Steverson – Gonzaga University: Ethics Pt 1	Conf. by Wanda w/Dr. Steverson 2.5.20
2:00 – 2:15	Break	
2:15 – 3:15	Dr. Brian Steverson – Gonzaga University: Ethics Pt 2	Conf. by Wanda w/Dr. Steverson 2.5.20
3:15 – 4:15	Kevin Webb, Piper-Sandler “Lies, Damned Lies & Economic Forecasts”	Confirmed by Wanda 2.6.20
4:15 – 4:30	Business Meeting – elect new officers	
6:00 - ??	WSACT BBQ	Alderbrook Dining Room
<b>Thurs., June 11</b>	<b>Alderbrook Resort</b>	
7:30 – 8:30	Breakfast for Conference Participants	Alderbrook Dining Room
9:00 – 10:30	Jason Klinghoffer, CFA – Mischler Financial; using cash flow to create an investment strategy	Confirmed by Wanda
10:30 – 10:45	Break	
10:45 – 12:00	Charlie Gavigan, Nona Snell, Alice Zillah – Fiscal Notes	Confirmed by Wanda
12:00 – 1:00	Sponsor Appreciation Lunch	
1:00 – 2:00	Nicole Muegge, Staci Ashe, GIOA, WFOA, and WPTA presentation	Confirmed by Wanda
2:00 – 2:15	Break	
2:15 – 3:15	Jim Blumenthal – Martin Nelson – Arbitrage & Underwriting, Combined Entities in one Bond offering	Confirmed by Wanda w/Jim 2.10.20
3:15 – 4:00	PACS Focus Group – Richard Beani, Ashley Reed	For PACS users
3:15 – 4:00	TR: Mannatron/Terrascan Users Group - Pending	Lisa to confirm
6:00 – ??	Banquet	Alderbrook Dining Room

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## 2020 WSACT Summer Conference - Union (Mason County), WA

<b>Fri., June 12</b>	<b>Alderbrook Resort</b>	
7:30 – 8:30	Breakfast for Conference Participants	Alderbrook Dining Room
8:00 – 9:00	WACO Update – Jennifer Wallace, Tim Grisham	
9:00 – 9:30	WSACT Business Meeting	

Investment qualifying = 7.5 pending

General = TBD

### **Vendor Setup & Breakdown:**

June 8 afternoon

June 12 morning or June 11 afternoon

DRAFT