

TMLI CREDIT ONLY

**TEXAS MUNICIPAL LEAGUE
Public Funds Investment Act Workshop**

March 14-15, 2024 – Waco, Texas

(Record of Attendance for Continuing Education)

SPONSOR ORGANIZATION - TEXAS MUNICIPAL LEAGUE #2554; Patterson & Associates #7375 COURSE NO. PFI031524

Session	Credit Hours	Attended
THURSDAY:		
PFIA AND PFCA LEGISLATIVE CHANGES 2021 <ul style="list-style-type: none">• Current Conditions Affecting Your Portfolio• Specific PFIA Requirements• Fundamentals of Public Investing: Risks and Cash Flow 8:30–10:00 a.m.	1.8	_____
MEETING YOUR OBJECTIVES <ul style="list-style-type: none">• Achieving Your Objectives• Developing and Checking Your Investment Policy/Strategy 10:15 a.m.–Noon	2.1	_____
REPORTING YOUR INVESTMENTS <ul style="list-style-type: none">• Banking Relationships• Procedures and Controls for Safety• Portfolio Strategies 1:00–2:15 p.m.	1.5	_____
DEPOSITORY CONTRACTS 2:15–3:15 p.m.	1.2	_____
UNDERSTANDING ECONOMIC INDICATORS 3:30–4:45 p.m.	1.5	_____
FRIDAY:		
USING INVESTMENT FUNDAMENTALS <ul style="list-style-type: none">• Finding and Using Liquidity• Accounting for the Types of Securities• Portfolio Reporting 8:00–10:15 A.M.	2.7	_____
INVESTMENT ACCOUNTING AND REPORTING <ul style="list-style-type: none">• Securities: Advantages and Disadvantages• Working with a Broker/Dealer 10:30 a.m.–Noon	1.8	_____
Total CEU Hours	12.6	_____

This form serves as a record of attendance in the session(s) indicated above and has been provided to help participants monitor their continuing education. CEU credits are based on 1 CEU per 50 minutes of training.

I hereby attest that I have attended the entire session(s) indicated above.

Participant’s Signature: _____

Print Name, Title, City: _____

Email: _____

ELECTED OFFICIALS APPLYING FOR TMLI CREDIT:

2024 TMLI GUIDELINES

- Please review the updated list of approved credit for 2024.
- Requests for credit must be received **within 30 days of the date of this training** to be considered. No exceptions.
- All areas of this form must be completed. **Incomplete forms will not be considered.**
- For detailed information visit www.tml.org and click on the education tab. Send forms to tml@tml.org.
- It is your responsibility to monitor your online record to make sure that credit has been applied.