

Miami Valley & Ohio Valley Joint Chapters Meeting

Course Description Quick Guide

Course Name	Course Description
Investment Update for Ohio School Districts Ryan K. Nelson, CFA, Co-Founder/ Portfolio Manager, RedTree Investment Group	<p>This course will provide a review of various types of investments available to public school districts. The presentation will also discuss the pros and cons of the various investment types.</p> <p>This course will provide attendees with an overview of a variety of methods for investing excess funds. There are specific investments permitted by Ohio law allowed for school districts. Understanding the various investment types available to school districts is critical for school treasurers.</p>
Understanding Property Taxes in Ohio David Graham, Auditor, Greene County	<p style="text-align: center;">Understanding Property Taxes and their calculations.</p> <p>Property Tax Changes: How to read abstract reports / Understanding why property values change / how to calculate collections</p> <p style="text-align: center;">Understanding property taxes including valuation, tax rates, effective rates, how to calculate tax reduction factors, to understand the financial implications that affect forecasting current and future revenue.</p>
A Look Back and a Look Forward for Markets Scott Stubbins, Managing Director, Stifel Financial Corporation	<p>This presentation will update attendees on the current market environment and discuss what to look for in the coming year. We will examine the 30-year bond rally and analyze whether the bull market in bonds is over. What a change in trend would mean to the economy, housing values, investments and bond financings going forward.</p> <p style="text-align: center;">The course content will include a market update and a discussion of municipal finance topics.</p>