

OASBO Essentials of Financial Management & Administration  
Course Description Quick Guide

Course Name	Course Description
<div>Investment Basics</div> <div>Ryan K. Nelson, CFA, Co-Founder/ Portfolio Manager, RedTree Investment Group</div> <div>1</div>	<div>This course will provide an overview on creating investment policies, administrative controls and cash forecasts. This information is critical when deciding how best to invest the funds of the district. Information will be included on the types of investments available along with ideas on establishing an investment outlook and strategy. Details will be provided on best practices for monitoring investments, rebalancing when needed, investment accounting and reporting results.</div> <div>The 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.</div> <div>2 Statement of Accreditation Rationale:</div> <div>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.</div>