

## TRAVEL APPROVAL FORM

**Department:** Auditor's Office

**Event Name:** 2025 Conference of the County Investment Academy

**Location:** Corpus Christi, TX

**Event Dates:** 06/16/25 - 06/18/25

**Purpose:** ☒ Required Continuing Education/Certification

☐ Job Training

☐ Other: \_\_\_\_\_

**Name of Attendees:**

Steve Watson Jennifer Lyon

\_\_\_\_\_

\_\_\_\_\_

<p><b>Court Decision:</b></p> <p><small>This section to be completed by County Judge's Office</small></p>
<div style="text-align: center;"><p>11-25-2024</p></div>

**Required Documents Checklist:**

**\*\* Same-Day Travel - Commissioners Court Approval is not required \*\***

**Overnight Travel**

☒ Travel Approval Form

☒ Registration Information or Confirmation

☒ Itinerary, Agenda, or Breakdown

☒ Hotel Information, Confirmation, or Hotel Reservation Request Form

**For Out of State Travel, please also include:**

☐ Cost Estimation Breakdown for Trip with Airfare, Rental Car, Meals, Hotel, Etc.

☐ Narrative as to why the Out of State Travel is necessary

**Signature of Elected Official/Department Head:**





# 2025 Conference of the County Investment Academy

June 16, 2025 - June 18, 2025 multi-day

10:00 AM - 12:00 PM

Omni Corpus Christi Hotel  
900 N. Shoreline Blvd.  
Corpus Christi, TX 78401

Contact Deanna Auert or Amy Lawson at (800) 456-5974.

[Contact Us](#)

## OVERVIEW

The Conference of the County Investment Academy brings together investment officers, economists and other experts to discuss the leading influences on the economy and trends in investing. This training is open to all county officials and staff members who want to learn more about county investment operations. The annual conference features roundtable discussions by portfolio size to meet your investing needs. Join us for 15 hours of discussions on timely public-funds investing topics.

### Continuing Education/Prerequisites

The SW Graduate School of Banking at SMU Cox is the education co-sponsor of the Conference of the County Investment Academy. There are no prerequisites to attend this program.

Fifteen hours of continuing education are approved for County Investment Academy members. CPAs, auditors, treasurers, clerks, commissioners and tax assessor-collectors may also earn credit toward mandatory continuing education requirements.

### County Investment Academy

The County Investment Academy is a partnership between the Texas Association of Counties and the SW Graduate School of Banking to work together in the planning of education programs for county officials and employees.

- Membership in the academy is acquired through completion of the Basics of County Investments Course or completion of a previous County Investment Officer (CIO) Level I course.
- Fifteen academy hours per calendar year are required to maintain membership, with five outside hours and five carryover hours allowed per year.

Registration Type	Before May 15	After May 15
County Official or Employee	\$250	\$300
City, School or Special District	\$305	\$355
Nongovernment	\$500	\$550
1-Day Registration, Tuesday, June 17 Only	\$150	\$200



# 2025 Conference of the County Investment Academy

June 16, 2025 - June 18, 2025 multi-day

10:00 AM - 12:00 PM

Omni Corpus Christi Hotel  
900 N. Shoreline Blvd.  
Corpus Christi, TX 78401

Contact Deanna Auert or Amy Lawson at (800) 456-5974.

Contact Us

## AGENDA

### Monday, June 16

**10 a.m. - 5 p.m.: Registration and Information Desk**

*Nueces Ballroom Foyer*

**1 - 1:10 p.m.: Welcome and Introductions**

*Nueces Ballroom*

**1:10 - 2 p.m.: General Session**

*Nueces Ballroom*

**2 - 2:10 p.m.: Break**

*Nueces Ballroom Foyer*

**2:10 - 3 p.m.: General Session**

*Nueces Ballroom*

**3 - 3:50 p.m.: General Session**

*Nueces Ballroom*

**3:50 - 4:10 p.m.: Break**

*Nueces Ballroom Foyer*

**4:10 - 5 p.m.: General Session**

**5 - 6:30 p.m.: Welcome Reception**

*Bayview Room*

Here's a great opportunity to network with fellow attendees over beverages and hors d'oeuvres.



# 2025 Conference of the County Investment Academy

June 16, 2025 - June 18, 2025    multi-day

10:00 AM - 12:00 PM

Omni Corpus Christi Hotel  
900 N. Shoreline Blvd.  
Corpus Christi, TX 78401

Contact Deanna Auert or Amy Lawson at (800) 456-5974.

Contact Us

## AGENDA

### Tuesday, June 17

**7:30 - 8 a.m.: Coffee and Continental Breakfast**

*Nueces Ballroom Foyer*

**7:30 a.m. - 3:50 p.m.: Registration and Information Desk**

*Nueces Ballroom Foyer*

**8 - 8:50 a.m.: General Session**

*Nueces Ballroom*

**8:50 - 9:40 a.m.: General Session**

*Nueces Ballroom*

**9:40 - 10 a.m.: Break**

*Nueces Ballroom Foyer*

**10 - 10:50 a.m.: General Session**

*Nueces Ballroom*

**10:50 - 11:40 a.m.: General Session**

*Nueces Ballroom*

**11:40 a.m. - 1 p.m.: Recognition Luncheon**

*Corpus A/B*

All conference attendees are invited to this special luncheon honoring those who have pursued excellence in investment education for five, 10, 15, 20 and 25 years. Those who completed the Basics of County Investments Course in 2024 and are new members of TAC's County Investment Academy will also be recognized.

**1 - 1:50 p.m.: General Session**

*Nueces Ballroom*

**1:50 - 2:10 p.m.: Break**

*Nueces Ballroom Foyer*

**2:10 - 3 p.m.: General Session**

*Nueces Ballroom*

**3 - 3:50 p.m.: Rountables by Portfolio Size**

Here's a great opportunity to discuss with your peers timely topics in county investments. Take advantage of this guided discussion to learn what other counties of similar portfolio size are doing and share your ideas.

- Small Portfolio: Less than \$20 million
- Medium Portfolio: \$20 to \$99 million
- Large Portfolio: \$100 million or more



# 2025 Conference of the County Investment Academy

June 16, 2025 - June 18, 2025 **multi-day**

10:00 AM - 12:00 PM

Omni Corpus Christi Hotel  
900 N. Shoreline Blvd.  
Corpus Christi, TX 78401

Contact Deanna Auert or Amy Lawson at (800) 456-5974.

Contact Us

## AGENDA

### Wednesday, June 18

#### 7:30 - 8 a.m.: Coffee and Continental Breakfast

*Nueces Ballroom Foyer*

#### 7:30 - 11:40 a.m.: Registration and Information Desk

*Nueces Ballroom Foyer*

#### 8 - 8:50 a.m.: General Session

*Nueces Ballroom*

#### 8:50 - 9:40 a.m.: General Session

*Nueces Ballroom*

#### 9:40 - 10 a.m.: Break

*Nueces Ballroom Foyer*

#### 10 - 10:50 a.m.: General Session

*Nueces Ballroom*

#### 10:50 - 11:40 a.m.: Public Funds Investing: The Final Challenge

*Nueces Ballroom*

Speakers: Sam Vaughan, Associate Financial Advisor, Ameriprise Financial Services, LLC

Carlos Pereda, Dimmit County Auditor

Come prepared to use your knowledge of public funds investing with this interactive quiz game. Bring your A-game to compete in multiple choice questions that are designed to test your knowledge on what was presented the last day and a half. Questions will also cover investment risks, controls and compliance with the Public Funds Investment Act.

#### 11:40 - 11:50 a.m.: Closing Remarks and Adjourn

*Nueces Ballroom*



## 2025 Conference of the County Investment Academy

📅 June 16, 2025 - June 18, 2025 multi-day

🕒 10:00 AM - 12:00 PM

📍 Omni Corpus Christi Hotel  
900 N. Shoreline Blvd.  
Corpus Christi, TX 78401

📞 Contact Deanna Auert or Amy Lawson at (800) 456-5974.

Contact Us

### HOTEL

#### Omni Corpus Christi Hotel

900 N. Shoreline Blvd.  
Corpus Christi, TX 78401  
(361) 887-1600

The Omni Corpus Christi Hotel is the host hotel. To receive the \$129 single/double conference room rate, call (361) 887-1600 and ask for the "2025 Conference of the County Investment Academy" room block. Hotel reservations must be made by May 15 or before the group room block is sold out, whichever occurs first, after which availability and rates are no longer guaranteed. To reserve your room online, [click here](#).

#### Parking:

Self-parking: \$10 per day