

a Perez

m: Delia Perales  
 ent: Tuesday, August 02, 2016 10:24 AM  
 To: Priscilla Perez  
 Subject: FW: CTAT Annual Conference

**From:** Norma G. Garcia [mailto:norma.garcia@co.hidalgo.tx.us]

**Sent:** Friday, July 29, 2016 1:43 PM

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**Subject:** Re: CTAT Annual Conference

Greetings my friends!

I am asking that those of you in Region 8 that are attending the conference (and I hope that all of you will attend), to please try to be at the Isla Grand Hotel, South Padre Island, by **Sunday, September 18th at noon** at the board room (next to the gift shop) to help fill the **300 registration tote bags** with items acquired by everyone. There are a few Treasurers actually arriving on Saturday, the 17th because the drive on Sunday would be too long.

If unable to attend that day, please ship the items to me at the address listed below and we will take care of putting them in the bags. If I do not receive the items by Friday, September 16th, the items will not be included. Acceptable items for the bags may consist of pens, pencils, letter openers, note pads, bottle openers, mouse pads, cozies, key chains, etc. Small items like these are easy to fit into the bags. I already have the tote bags, fans, mini beach balls (not inflated), dollar sign stress balls, plastic tumblers, and a mini-sun kit.

Thank you in advance for helping with this project. If you have any questions, please let me know.

**Norma G. Garcia**  
**Hidalgo County Treasurer**  
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Event Presentations

68th Annual County Treasurers' Association of Texas Conference - Agenda

County Investment Academy

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Judicial Education Center

Leadership 254

Special Presentations

Special Presentations Request

Monday, September 19	
Noon-5 p.m.	<b>Registration and Information Desk Open</b>
Noon-1 p.m.	<b>Past Presidents' Committee Luncheon/Meeting</b>
1-2 p.m.	<b>Legislative Committee Meeting</b>
2-2:30 p.m.	<b>Fundraising Committee Meeting</b>
2:30-3 p.m.	<b>Nominating Committee Meeting</b>
3-3:30 p.m.	<b>Education Committee Meeting</b>
3:30-5 p.m.	<b>CTAT Board Meeting</b>
5-7 p.m.	<b>Early Bird Reception at the Hammerhead Deck</b>
7-9 p.m.	<b>Entertainment at the Quarterdeck Lounge/Crab Races Contest</b>
Tuesday, September 20	
7:30-8 a.m.	<b>Continental Breakfast</b>
8 a.m.-4 p.m.	<b>Registration and Information Desk Open</b>
8 a.m.	<b>Welcome</b>
8:30-9:30 a.m.	<b>Suffer from Burnout?</b> This session is a unique presentation; it is intimate, very personal, raucous, engaging and compelling – with a twist. Mark has the ability to really connect with his audiences and identifies the set of tools needed to prevent or overcome burnout. <i>Mr. Mark Yarborough</i>
9:30-10:30 a.m.	<b>\$\$\$ Maximizing Investment Opportunities in a Low-Rate Environment</b> This session will offer suggestions on how to increase yield even when interest rates are low. <i>Mr. Fernando Pulido, Sr. Vice President, MultiBank Securities</i>
10:30-10:45 a.m.	<b>Break</b>
10:45-11:45 a.m.	<b>Disaster Finance and the Treasurers' Role</b> This session is designed to give local jurisdictions the financial tools needed to help recover from a disaster before a disaster occurs and facilitates communication between disaster responders and financial managers. <i>Mrs. Shari Ramirez-MacKay, CEM, Texas DPS</i>
11:45a.m.-1 p.m.	<b>Mama Mia President's Luncheon</b>
1-3 p.m.	<b>\$\$\$ Customer Due Diligence, Enhanced Banking &amp; IRS Reporting Regulations</b> Effective policies & procedures provide critical framework that enables the bank to comply with regulatory requirements regarding county monies and investments. <i>Mr. Julio Roman, Lone Star National Bank</i>
3-3:15 p.m.	<b>Break</b>
3:15-4:15 p.m.	<b>\$\$\$ How to Stay in Compliance &amp; Out of Trouble in My Investments</b> In investing there are many moving parts and always some risk. This session looks at controls and compliance points to make sure you and your investments are safe. <i>Ms. Linda Patterson, President, Patterson &amp; Associates</i>
6-9 p.m.	<b>Fiesta Time Reception, Dinner and Entertainment</b>

<b>Wednesday, September 21</b>	
8-8:30 a.m.	<b>Continental Breakfast in Vendor Area</b>
8 a.m.-5 p.m.	<b>Vendor Fair</b>
8 a.m.-4 p.m.	<b>Voting for Texas Outstanding County Treasurer</b>
8:30-8:45 a.m.	<b>Call to Order &amp; Announcements</b>
8:45-9:45 a.m.	<b>\$\$\$ Creating the Right Investment Solution for Your Public Funds – Investment Policy, Cash Flow Analysis and Prudent Management</b> What should be considered in creating the right investment solution for your local government, with a focus on safety-first investing? How important is it to prepare a cash flow analysis, in order to develop a solution that provides sufficient liquidity? How should the investment strategy and implementation be managed and monitored? <i>Ms. Sheila Duffy, Public Trust Advisors TexasCLASS</i>
9:45-10:30 a.m.	<b>Break with Vendors</b>
10:30-11:30 a.m.	<b>CTAT Business Meeting/Door Prizes/2017 Conference Presentation</b>
11:30 a.m.-1 p.m.	<b>Boot Scootin' Luncheon Honoring TOCTA Nominees</b>
1-2:30 p.m.	<b>The Power of One and Ideas to Stay Motivated</b> With determination and confidence, "The Power of One" can become the "Power of Some" and then you can expect to live and work in an environment of how "things should be" and not an in environment of just "the way things are." <i>"Happy" the Entertainer and Motivational Speaker</i>
2:30-3 p.m.	<b>Visit Vendor Booths and Sign Up for Prizes to be given away at 4-5 p.m.</b>
3-4 p.m.	<b>Valley Legislators/Other Elected Officials</b> This will offer an opportunity to meet and interact with our legislators and listen as they discuss with us what they feel will be the highlights or burning issues of the next legislative session. It will also provide a time for the association to talk about issues important to County Treasurers and let them hear from us directly.
4-5 p.m.	<b>Visit the Exhibitors/Raffle Giveaways</b>
6-7 p.m.	<b>Aloha! Reception and Silent Auction</b>
7-8 p.m.	<b>Installation Banquet Honoring Tim Funchess, Incoming CTAT President</b>
8-10 p.m.	<b>Dance/Entertainment (prize awarded to best luau costume)</b>
<b>Thursday, September 22</b>	
8-9 a.m.	<b>Breakfast Buffet</b>
9-9:15 a.m.	<b>Call to Order and Announcements</b>
9:15-10:05 a.m.	<b>Bullying in the Workplace</b> Things such as "bullying" occur in the office but people may not want to step up and relay that information for fear of retaliation. I will discuss how bullying is defined, how it affects people, resources and strategies that can help you, and updates on HB3226 that may offer possible legal solutions. <i>Ms. Maggie Gutierrez</i>
10:10-11 a.m.	<b>Round Table Discussion</b> This will provide an opportunity to discuss mutual problems that we each face in our counties & share possible solutions.
11-11:15 a.m.	<b>Closing Remarks and Door Prizes</b>
11:15 a.m.-12 p.m.	<b>CTAT Board Meeting</b>