

# CPE & Annual Meeting Agenda



## President

Kristin Thompson, CGFO  
Finance Program Manager  
Suwannee River Water  
Management District  
Kristin.Thompson@srwmd.org

## Vice-President

Dallas Lee, CGFO, SHRM-CP  
Assistant City Manager/CFO  
City of Newberry  
Dlee@NewberryFL.gov

## Secretary

Missy Licourt, CPA, CGFO  
Budget Director  
St. Johns River Water Management  
District  
mlcourt@sjrwmd.com

## Treasurer

Heather Carter, CGFO  
Accounting Manager  
City of Alachua  
he.carter@cityofalachua.org

## Chapter Information:

Website: fgfoa.org  
Facebook: North Central Florida  
Chapter of the FGFOA  
www.facebook.com/ncfgfoa

Please join us for the Chapter's FY 2026 Annual Meeting. Chandler Asset Management has assisted us in coordinating an ***eight*** hour Investment Seminar which provides the 8 hours of annual continuing education required by Florida Statute 218.415 for those responsible for making investment decisions and Technical Business (TB) CPE for others. We will conduct our Annual Business meeting during the lunch hour where we will vote on next year's board. If you are interested in an opportunity to become more involved and enhance your leadership skills, we want to hear from YOU!!

## Location and Time:

**Date:** Wednesday, April 22, 2026

**Time:** 7:45 am to 4:30 pm

**Location:** Menthollee Norfleet Municipal Building  
25420 W. Newberry Road  
Newberry, FL 32669

**CPE:** 8 hours of TB (Investment)

## Meeting at a Glance:

7:45-8:30 Registration and breakfast catered by Cowboyz

8:30-10:10 *Economic Update and Structuring Your Investment Program*  
Speakers: Scott Stitcher & Lili Arnsdorff, Chandler Asset Management

10:10-10:20 Break

10:20-12:00 *Bond Issuance Process*: Update on Bond Markets, New Money Financing, and Refunding Opportunities  
Speaker: Andre Devenbeck, RBC Capital Markets

12:00-1:00 Lunch & Business Meeting— catered by Cowboyz

1:00-2:40 *New Developments in Continuing Disclosure*  
Speaker: Lisa Olsen, DAC Bond

2:40 to 2:50 Break

2:50 to 4:30 *Update on Best Practices for Debt Financing*: Review of Bank vs Bond Options  
Speaker: Jeff Larson, Larson Consulting Services