Bond Case Briefs

Municipal Finance Law Since 1971

Best Practices and Strategies for Public Investing: GFOA eLearning Course

December 5, 6 & 7, 2023 | 1-4 pm ET

This course offers attendees a comprehensive agenda of the concepts and techniques needed to effectively manage their investment portfolios. This two-day course highlights the importance for governmental entities to have a robust investment policy and corresponding procedures, and brings attention to GFOA's best practices related to investing. Through interactive activities and classroom presentations, attendees will gain a better understanding of the various elements of an investment program, whether the portfolio is managed internally or externally. Topics covered include:

- Investment Program
- Investment Policy
- Cash Flow Forecasting & Investing
- Roles and Responsibilities of Internal and External Professionals
- Investing Strategies
- Investment Reporting
- Performance Measurement and Benchmarking
- Internal Controls
- Case Studies
- Market Update

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