



CALIFORNIA MUNICIPAL TREASURERS ASSOCIATION
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November 25, 2014

The Investment Policy Certification program is now two years old. To date, we have had 33 cities, counties and special districts had their Investment Policies evaluated. 70% of policies pass on the first attempt. Entities not passing on the first attempt can re-submit at no charge.

The committee now has seven rotating evaluators:

Steve Groom

Debbie Kukta

Greg Paden

Doug Robinson

Rick Phillips

Sarah Meacham

Shaun Farrell

I will declare that the Certification program has been a success. If anyone would like to become an evaluator, please contact Shaun Farrell.