



CALIFORNIA MUNICIPAL TREASURERS ASSOCIATION
Serving California Since 1959

TO: CMTA Board of Directors

FROM: Shaun L. Farrell, CCMT, CMTA Investment Policy Certification Chair

DATE: July 17, 2015

SUBJECT: Investment Policy Certification Report

New Certifications/Re-Certifications

To date, we have had 34 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.

Current policy under review: City of Corona, submitted on July 17, 2015.

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.

Shaun L Farrell, CCMT

City Treasurer

City of Galt

(209) 366-7144

sfarrell@ci.galt.ca.us