

PUBLIC FUNDS INVESTMENT TRAINING FOR APPRAISAL DISTRICTS

(IN-PERSON ONLY)



The purpose of this workshop is to provide training mandated by Texas Government Code, Chapter 2256. This two-day seminar meets the required 10 hours of PFIA training needed every two years by all individuals serving as financial officer, treasurer or investment officer of a local government, including an appraisal district.

Please Note: TAAD can report credit to TDLR for this event only. If you attend a separate PFIA event offered by North Central Council of Governments (or any other provider), TAAD is unable to report the credit to TDLR.

CLASS INFORMATION

Dates: October 1-2, 2025

Location: Dallas CAD; 2949 North Stemmons Freeway, Dallas, Texas 75247

Lodging: See TAAD website for ideas

CEs: 10 hours

Registration deadline: September 24, 2025

Hours:

- Day 1: Registration 8-8:30; class 8:30am-5pm, lunch on your own
- Day 2: Class 8:30-12

Instructor: Patrick Shinkle, North Central Council of Governments

Topics discussed: Public Funds Investment Act Compliance, Texas Public Funds Collateral Act, developing a certificate of deposit program, investment policies, investment basics, factors that affect interest rates, using excel for investment controls, investment pools, internet resources for investment decisions, internal controls, the budgeting process, computer security awareness controls and business impact analysis.

REGISTRATION INFORMATION

Name _____ TDLR number _____

Jurisdiction _____

Address _____ City _____

State _____ Zip _____ Phone number _____

Email address _____

REGISTRATION FEES

Registration fees must reflect current membership status.

☐ \$250 TAAD Member
District

☐ \$300 TAAD Affiliate or
Associate Member

☐ \$375 Nonmember

CANCELLATION/REFUND POLICY

Requests for refunds must be in writing and submitted by September 24, 2025; a \$75 cancellation fee will be deducted. No refunds for cancellations after September 24, 2025.

Please complete the registration form & return along with payment to:
TAAD | 7700 Chevy Chase Drive; Bldg. One, Suite 425 | Austin, TX 78752-1558

TAAD Office Use ONLY

Date: _____

Ck #: _____

Paid: _____

DB: _____