



EDUCATION  
CONFERENCE

AGENDA

Tuesday, October 4, 2022

1:00 p.m. – 5:00 p.m. Registration Sierra Ballroom Foyer

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6:00 p.m. – 6:30 p.m. Management Reception (Registered Associate Members Welcome) Redwood Sequoia  
Bar Service Sponsored by: INVOICE CLOUD

Wednesday, October 5, 2022

8:00 a.m. – 5:00 p.m. Registration Sierra Ballroom Foyer

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9:00 a.m. – 10:30 a.m. New Treasurer-Tax Collector Training Sierra Ballroom

**PANEL:**

Barbara Sullivan, Calaveras County Treasurer-Tax Collector  
Julie White, Plumas County Treasurer-Tax Collector

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10:00 a.m. – 11:00 a.m. Legislative Committee Tiburon

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11:00 a.m. – 12:00 p.m. Executive Committee Sausalito

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12:00 p.m. – 1:00 p.m. Lunch (Registered Associate Members Welcome) Courtyard

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12:45 p.m. – 1:00 p.m. Conference Kick-off Sierra Ballroom

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1:00 p.m. – 2:00 p.m.    **Keynote Speaker**    **Sierra Ballroom**  
**SPEAKER:** Mike Callagy, County Executive  
San Mateo County

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2:00 p.m. – 3:45 p.m.    **Legislative Update/Platform**    **Sierra Ballroom**  
**PANEL:**  
Dan Mierzwa, Yuba County Treasurer-Tax Collector  
Karen Lange, Partner, Shaw, Yoder, Antwih, Schmelzer, & Lange

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3:45 p.m. – 4:00 p.m.    **Break**    **Sierra Foyer**  
(Registered Associate Members Welcome)  
**Sponsored by: CAMP**

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4:00 p.m. – 5:00 p.m.    **Excess Proceeds**    **Sierra Ballroom**  
**SPEAKERS:** Marc Smith, Analyst, State Controller's Office  
Jacqueline Torres, Assistant Tax Collector-Treasurer  
Madera County

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6:00 p.m. – 7:00 p.m.    **Management Reception**    **Redwood Sequoia**  
(Registered Associate Members Welcome)  
**Bar Service Sponsored by: CALTRUST**

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## Thursday, October 6, 2022

7:30 a.m. – 9:00 a.m.    **Breakfast**    **Sierra Foyer**  
(Registered Associate Members Welcome)  
**Sponsored by: CSAC FIN CORP**

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8:00 a.m. – 12:00 p.m.    **Registration**    **Sierra Foyer**

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9:00 a.m. – 10:00 a.m.    **Cybersecurity and Fraud Prevention**    **Sierra Ballroom**  
**SPEAKER:** Sam Collis, Vice President, JPMorgan Chase

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10:00 a.m. – 10:15 a.m.	<b>Break</b> (Registered Associate Members Welcome) <b>Sponsored by: UBS</b>	Sierra Foyer
10:15 a.m. – 11:00 a.m.	<b>Prop 19</b>  <b>SPEAKER:</b> Peter Aldana, Assessor-Clerk-Recorder Riverside County	Sierra Ballroom
11:00 a.m. – 12:00 p.m.	<b>Economic Update</b>  <b>SPEAKER:</b> Will Goldthwait, Portfolio Strategist State Street Global Advisors	Sierra Ballroom
12:00 p.m. – 1:00 p.m.	<b>Lunch</b> (Registered Associate Members Welcome)	Courtyard
1:00 p.m. – 2:15 p.m.	<b>Geopolitical Update</b>  <b>SPEAKER:</b> General Robert S. Walsh (Ret), Advisor Academy Securities	Sierra Ballroom
2:15 p.m. – 3:30 p.m.	<b>Government-Sponsored Enterprises/Supra Panel</b>  <b>PANEL:</b> Denise de Bombelles, SVP, Federal Home Loan Banks Diane Asuncion, Manager-Fixed Income Strategy, Farmer Mac Scott Cantor, Senior Financial Officer, The World Bank	Sierra Ballroom
3:30 p.m. – 3:45 p.m.	<b>Break</b> (Registered Associate Members Welcome) <b>Sponsored by: RAYMOND JAMES</b>	Sierra Foyer
3:45 p.m. – 5:00 p.m.	<b>Treasury Management Systems</b>  <b>PANEL:</b> Lauren Warrem, Chief Deputy Treasurer, San Diego County Karen Adams, Merced County Treasurer-Tax Collector John Byerly, Chief Investment Officer, Riverside County	Sierra Ballroom

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6:30 p.m. – 10:00 p.m. **Dinner & Special Event – “Basketball” Theme**  
(Registered Associate Members Welcome) **Sierra Ballroom**

## **Friday, October 7, 2022**

7:30 a.m. – 9:00 a.m. **Breakfast**  
(Registered Associate Members Welcome) **Sierra Foyer**

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8:30 a.m. – 9:00 a.m. **Commercial Associates Best Practices for TTC Roundtable** **Sierra Ballroom**

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9:00 a.m. – 10:00 a.m. **TTC & Staff Only Best Practices Roundtable** **Sierra Ballroom**

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