

**Morgan Stanley**



**Spring Meeting**  
**March 9, 2017** 

**Hilton Garden Inn Findlay**  
**1050 Interstate Drive West, Findlay, Ohio 45840**

### ***CPIM Training from NWOASBO!***

*Are you looking for an opportunity to obtain CPIM credit close to home and work? NWOASBO will be offering 4 hours of CPIM training (pending approval) at our March 9<sup>th</sup> meeting. The presenters for this seminar are well-known experts in the areas of school finance, investments, and bonds.*

**Agenda:**

<b>9:30-10:00</b>	<b>Registration</b>
<b>10:00-11:00</b>	<b>Board of Revision – Tess Tannehill &amp; Jonathan Brollier, Bricker &amp; Eckler</b>
<b>11:00-12:00</b>	<b>Bonds, Refundings, Official Statement and Required Appropriations, etc. – Michelle Hillstrom, Stifel, and Ed Cavezza, Dinsmore &amp; Shohl LLP</b>
<b>12:00-12:10</b>	Business Meeting
<b>12:10-12:50</b>	<b>Lunch</b>
<b>1:00-2:00</b>	<b>OASBO Update – Jim Rowan, OASBO Executive Director</b>
<b>2:00-3:00</b>	<b>Small Government Investment Options.. and Your Forecast – Jason Headings &amp; Nick Vaccari, Meeder Investments</b>
<b>3:00-4:00</b>	<b>Topic TBD – Wade Steen, Steen &amp; Company LLC</b>
<b>4:00</b>	<b>Adjourn</b>

***Individuals will still need to pay the annual certification fee (\$100) to the Treasurer of State.***

### **Spring Meeting Registration**

***\$20.00 Registration Fee***

***Thanks to our sponsors: AXA, Morgan Stanley & Sudsina & Associates LLC***

Please follow this link to register for the meeting by March 1, 2017:

[https://docs.google.com/forms/d/e/1FAIpQLSdsm9VJiUBLx--054v\\_EIne6bJqxlB\\_ReLTAsKYhIhybtAMA/viewform](https://docs.google.com/forms/d/e/1FAIpQLSdsm9VJiUBLx--054v_EIne6bJqxlB_ReLTAsKYhIhybtAMA/viewform)

Please send checks payable to NWOASBO to:

**NWOASBO**

ATTN: Joyce Kinsman, Treasurer  
Swanton Local Schools  
108 N. Main Street  
Swanton, OH 43558

**Note: If your registration and payment won't reach us by March 1<sup>st</sup>, please e-mail registration information to [joyce.kinsman@swantonschools.org](mailto:joyce.kinsman@swantonschools.org).**