



# 21<sup>ST</sup> ANNUAL CONFERENCE

2026 | LAS VEGAS

## Government Attendees Registration

TUESDAY, MARCH 10<sup>TH</sup>  
4:00 PM - 6:00 PM  
Early Registration | [Presidio 1](#)

WEDNESDAY, MARCH 11<sup>TH</sup>  
7:30 AM - 8:00 AM  
Registration | [Presidio 1](#)

## Corporate Attendees Registration

WEDNESDAY, MARCH 11<sup>TH</sup>  
3:00 PM - 4:00 PM  
Early Registration | [Presidio 1](#)

WELCOME RECEPTION  
5:30 PM - 6:30 PM  
[Terrace Poolside](#)

**Check-in Tip:** Please have your  
registration QR code ready.



Scan here to access your  
Eventsquid account and the  
conference website

# Wednesday

## MARCH 11, 2026

Government Attendees Only (Pre-Conference)

**7:30 - 8:00 AM Registration & Buffet Breakfast**  
Presidio 1 (Reg) | Griffith 1-6 (Breakfast)

**8:00 - 8:30 AM**

### Beg/Int Government Peer-To-Peer

Presidio 2-3 | .5 CPE (Personal Development)

**Moderator: Hubie White** - GIOA Past President, Chief Investment Officer, City and County of San Francisco

### Adv Government Peer-To-Peer

Presidio 4-5 | .5 CPE (Personal Development)

**Moderator: Shawn Nydegger** – GIOA President; Director of Investments, Idaho State Treasurer's Office

**8:30 - 10:00 AM**

### The KISS Investment Program

Presidio 2-3 | .5 CPE (Personal Development)

With government investment programs special stewardship over taxpayer funds, a time-tested approach is to Keep It Simple and Systematic (KISS). Simple certainly doesn't mean rudimentary, but it's an understandable and systematic approach to the three primary objectives of safety, liquidity, and income.

**Speaker: Rick Phillips** – GIOA Founder, Chief Investment Strategist, Meeder Public Funds

**Moderator: Hubie White** - GIOA Past President, Chief Investment Officer, City and County of San Francisco

### ABCP's Role in Cash Management

Presidio 4-5 | .5 CPE (Personal Development)

A current look at how ABCP fits into today's public-sector short-term investment toolkit.

**Speaker: Richard Smith** - Senior Relationship Manager, Northcross Capital

**Moderator: Eric Ajlouny** - GIOA Corporate Liaison Director; Director, RBC Capital Markets

**10:00 - 10:30 AM**

**Refreshment Break (Balboa)**

**10:30 - 11:45 AM**

### From Start to Finish

Presidio 2-3 | 1.25 CPE (Finance)

In this session, we will discuss effective cash management practices to ensure the entity is performing these functions while minimizing costs, protecting the funds entrusted to them from risks and maximizing interest income while preserving principal.

**Speaker: Laura Glenn, CFA** - Director, Institutional Liquidity Management RBC GAM

**Moderator: Jason Carini** - GIOA Secretary, Rogers County Treasurer

### Agency CMBS 101

Presidio 4-5 | 1.25 CPE (Finance)

This session reviews Agency CMBS for government investors. We'll explain Fannie Mae and Freddie Mac's Guaranteed CMBS programs. Takeaways include how to analyze structure, collateral, prepayment risk, and use disclosure tools. We'll finish with a discussion on policy, compliance, and benchmarking considerations for adding Agency.

**Speaker: Nicholas Sferranza** – Executive Director - Agency CMBS & SBA, StoneX Financial Inc.

**Moderator: Claude Seide** – GIOA Corporate Liaison Director; Head of Rates & Securitized Products, Siebert Williams Shank

**11:45 - 1:00 PM**

**Lunch & Diamond Sponsor Introductions**  
Griffith 1-6

# Wednesday

## MARCH 11, 2026

Government Attendees Only (Pre-Conference)

1:00 - 2:15 PM

### AI-DRIVEN INSIGHTS

**Presidio 2-3 | 1.25 CPE (Finance)**

Public sector investors are navigating increasingly complex markets, heightened regulatory scrutiny, and growing demands for transparency. In this session, CWAN will explore how artificial intelligence is reshaping investment analysis, risk management, and reporting for public sector portfolios.

**Speaker: Greg Whipple** – Director of Asset Owner Solutions, Clearwater Analytics

**Moderator: Karen Adams** – GIOA Board Member at Large; Treasurer-Tax Collector, Merced County

### Next Era Cash Management

**Presidio 4-5 | 1.25 CPE (Finance)**

Global and U.S. regulators are introducing sweeping changes that will reshape the liquidity and capital landscape for large banks. This session will also explore how recent monetary policy changes from the Federal Reserve may impact future liquidity, helping firms better align with their short-term liquidity and cash investment strategies.

**Speaker: William Goldthwait** – VP, Client Portfolio Strategist, State Street Investment Management  
**Mark Zdunek, CPA** – SVP, Global Public Sector Market Manager, Liquidity Management Services, Citibank  
**Moderator: Hubie White** – GIOA Past Pres, CIO at City of SF

2:15 - 2:45 PM

Refreshment Break (Balboa)

2:45 - 4:00 PM

### Why Investment Plans Matter

**Presidio 2-3 | 1.25 CPE (Finance)**

This session will review the ins and outs of creating a dynamic investment plan that works for your organization. The session will include investment policy, cash flow analysis, portfolio component strategies, and reporting tools that will streamline your investment decisions. It is about Safety, Liquidity and Return.

**Speaker: Deanne Woodring** – President and Senior Advisor, Government Portfolio Management

**Moderator: Brett Sekula** – GIOA Treasurer; Investment Officer, City of San Antonio

### Buying Corporate Bonds & IFANs

**Presidio 4-5 | 1.5 CPE (Finance)**

Whether you are a seasoned professional that has purchased corporate bonds for years, or a novice government portfolio investment manager, this session is designed for you. Want to add corporate bonds to your portfolio, but have some hesitations? Learn more about the fundamentals of evaluating corporate bonds and insurance funding agreement backed notes and the role they can serve in your investment program.

**Speaker: Stephen Bennett, CFA, CTP** – Vice President, Mischler Financial  
**Dan Krieter** – Director, BMO Capital Markets

**Moderator: Arthur Whitten** – GIOA President-Elect; Director, Washington State University

## EVENING EVENT

# Welcome Reception

**TERRACE POOLSIDE @ PARK MGM**

**5:30 - 7:30 PM**

Join us for a casual evening poolside with scrumptious food and drinks. Mingle and meet up with friends, both old and new.



# Thursday

## MARCH 12, 2026

ALL ATTENDEES

**8:15 - 9:00 AM Registration & Buffet Breakfast**  
**Presidio 1 (Reg) | Griffith 1-6 (Breakfast)**

**9:00 - 9:15 AM Welcome & Recognition**  
Rick Phillips – GIOA Founder, Chief Investment Strategist, Meeder Public Funds  
Shawn Nydegger – GIOA President; Director of Investments, Idaho State Treasurer's Office

**9:15 - 10:30 AM KEYNOTE SPEAKER**  
**1.25 CPE (Economics)**

With 2025's tariffs, sticky inflation, and Fed cuts, what will 2026 bring? We will discuss the potential impacts of a new Fed Chair, a more "dovish Fed", K-shaped economy, slowing labor conditions, midterm elections, and other important events.

**Speaker: Christopher Thornberg, Ph.D.** – Founding Partner at Beacon Economics  
**Moderator: Rick Phillips** – GIOA Founder, Chief Investment Strategist, Meeder Public Funds

**10:30 - 11:00 AM Refreshment Break (Balboa)**

**11:00 - 12:00 PM Federal Agency Market Update**  
**1 CPE (Finance)**

This session will discuss the business fundamentals of the Federal Home Loan Bank System and provide details about the drivers of supply and demand for the multi-trillion US\$ issuance program of FHLB Consolidated Obligations. The FHLB Office of Finance and the dealer community will share insights into the System's debt funding practices and other relevant market commentary.

**Speaker: Denise de Bombelles** – SVP, Global Investor Relations, Federal Home Loan Bank Office of Finance,  
**Ed Bridge** – Head of Funding, FHLB Office of Finance, **Aparna Ramesh** – CEO, FHLB Office of Finance  
**Moderator: Shawn Nydegger** – GIOA President; Director of Investments, Idaho State Treasurer's Office

**12:00 - 1:30 PM Lunch**  
**Griffith 1-6**

**11:00 - 12:00 PM Professional Development: Stronger Than Your Strengths**  
**1 CPE (Professional Development)**

Most leaders rely on what they do best—but in today's high-stakes, high-accountability environments, strengths alone aren't enough. In this fast-paced, practical session, Spencer reveals how the most effective leaders identify blind spots, reduce drag, and expand their leadership range. Learn how to evolve with purpose, lead with clarity, and turn limitations into levers for long-term impact.

**Speaker: Spencer Horn** – President, Altium Leadership  
**Moderator: Rick Phillips** – GIOA Founder, Chief Investment Strategist, Meeder Public Funds

**2:30 - 3:00 PM Refreshment Break (Balboa)**

# Thursday

## MARCH 12, 2026

ALL ATTENDEES

### 3:00 - 4:00 PM **Intersection of Geopolitics and Macro**

**1 CPE (Economics)**

Everyone is affected by geopolitical events. At its simplest, geopolitics can impact the price of oil, gas, energy, cobalt, etc. At its more complex levels, geopolitics shapes international relations, global trade, and our economy. It affects the Federal Reserve and therefore interest rates.

**Speaker:** Peter Tchir – Head of Macro Strategies, Academy Securities

**Moderator:** Tonya Dazzio – GIOA Cofounder, Director, Advisory Services, Meeder Public Funds

### EVENING EVENT

## ON THE RECORD

SPEAKEASY CLUB @ PARK MGM

**5:30 - 8:00 PM**

Food, drinks, and dancing

**Wear your favorite band/singer t-shirt!**



# Friday

## MARCH 13, 2026

ALL ATTENDEES

### 8:15 - 9:00 AM **Continental Breakfast (Griffith 3)**

**9:00 - 10:00  
AM**

#### **Government Peer-To-Peer**

**Griffith 1-2 | 1 CPE (Personal Development)**

Always a popular session! Take this opportunity to discuss what you've learned at the GIOA Conference with your peers from around the country. We will be chatting about best practices and other important information to take back home. Make sure to bring your Investment Policy and investment reports for reference.

**Moderator:** Shawn Nydegger – GIOA President; Director of Investments, Idaho State Treasurer's Office

#### **Corporate Peer-To-Peer**

**Griffith 4 | 1 CPE (Personal Development)**

Take this opportunity to discuss your perspective on with government investment programs and trends you are seeing in the marketplace.

**Moderator:** Eric Ajlouny - GIOA Corporate Liaison Director; Director, RBC Capital Markets

# Our 2026 sponsors

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## Diamond



## Platinum



## Gold



## Exhibitor



Thank you!

# GIOA Board of Directors

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### **Founder**

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