

Missouri Public Finance Institute

August 24, 2016



7:30 a.m. — Breakfast/Registration

8:00 a.m. — Welcome

Missouri State Treasurer Clint Zweifel

8:10 a.m. — Economic Outlook

Chris Varvares, Macroeconomic Advisors

A presentation on the current state of the economy, including market trends, interest rates, etc

8:45 a.m. — Investment Panel

Scott Colbert, Commerce Bank; Maria Lawlor, PFM;

Bruce Ring, Missouri State Treasurer's Office

A discussion of investment topics ranging from advisory services, economic impacts on investment decision making and policy, and portfolio construction

10:00 a.m. — Break

10:15 a. m. — Behavioral Ethics

Lamar Pierce, Washington University

A presentation on using behavioral factors to promote an ethical workplace culture

11:15 a.m. — Raising Funds for Municipal Infrastructure: Public vs. Private Panel

Pepe Finn, Stern Brothers; Tom Lally, UMB; Dennis Lloyd, Columbia Capital Management

A discussion on pertinent information impacting the municipal bond market and issues directly effecting issuers of tax-exempt debt

12:15 p.m. — Networking Lunch

1:15 p.m. — Defined Contribution Retirement Plan Design

Cindy Rehmeier, MOSERS; Paul Staples, Summit Strategies;

Ray Boshara, St. Louis Federal Reserve

A discussion on how to incorporate behavioral trends into DC retirement plan designs to maximize savings among users

2:15 p.m. — Break

2:30 p.m. — Ethics in Public Finance

Christina Solomon, Rubin Brown

A presentation on specific steps to take in order to prevent, detect or report fraudulent behavior within public finance

3:30 p.m. — Closing remarks