

## **Deschutes County Investment Advisory Committee**

Semi-Annual Meeting April 17, 2026, 11:30am – 1:00pm, In-Person

Location – Deschutes County Administration Building, 2<sup>nd</sup> Floor Allen Room

Join Zoom Webinar:

<https://deschutescounty.zoomgov.com/j/1615851744?pwd=r9r7OA3Tlwpaek33kNoLOA8bZ25h6S.1>

Webinar ID: 161 585 1744 | Passcode: 403369

By Telephone: Dial 1-669-254-5252

Committee Purpose: The committee will meet with the County Treasurer at least twice per year and review the investment portfolio with regards to compliance with the adopted investment policy. The committee will make recommendations to policy changes and possible investment procedures.

### Members:

Eric Berlin – Director, AJ Gallagher & Co.  
Craig Renkert – Retired CFO, Federal Metals Credit Union  
James Wood – Accounting Manager, City of Redmond  
Richard Ambrose – Principal, Axia Wealth Management

### County Staff:

Patti Adair – Deschutes County Commissioner  
Nick Lelack – Deschutes County Administrator  
Bill Kuhn – Deschutes County Treasurer  
Robert Tintle – Deschutes County CFO  
Angie Powers – Administrative Assistant

### Agenda

1. Call to Order
2. Introductions/Notices
3. Review/Approve minutes from October 14, 2025 meeting
4. Treasurer’s Report
5. Investment Policy Discussion
6. Other Considerations – Upcoming open committee position
7. Market Discussion
8. Next Steps/Updates
  - a. Investment Policy Statement – next steps
  - b. Annual review of Investment Broker/Dealer authorization update
9. Other Discussion Items
10. Adjourn



Deschutes County encourages persons with disabilities to participate in all programs and activities. This event/location is accessible to people with disabilities. If you need accommodations to make participation possible, please call (541) 388-6571 or send email to [angie.powers@deschutes.org](mailto:angie.powers@deschutes.org).

Condado de Deschutes alienta a las personas cualificadas con discapacidad a participar en sus programas y actividades. Esta evento/ubicación es accesible para personas con discapacidad. Si necesita hacer arreglos para hacer posible la participación, llame al (541) 388-6571 o envíe un correo electrónico a [angie.powers@deschutes.org](mailto:angie.powers@deschutes.org).