

Deschutes County Investment Advisory Committee

Semi-Annual Meeting October 14, 2025, 11:30am – 1:00pm, In-Person

Location – Deschutes County Administration Building, 2nd Floor Allen Room

Topic: Investment Advisory Committee

Time: October 14, 2025 11:30 PM Pacific Time (US and Canada)

Join Zoom Meeting

<https://us02web.zoom.us/j/83945113906>

Meeting ID: 839 4511 3906

One tap mobile

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By phone: 1-253-215-8782 US

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 April 17, 2025 meeting
4. Treasurer's Report
5. Investment Policy Discussion
6. Other Considerations –
7. Market Discussion
8. Next Steps/Updates
 - a. Update on Investment Policy Statement
 - 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) 388-6584 or send email to erik.kropp@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) 388-6584 o envíe un correo electrónico a erik.kropp@deschutes.org.
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