



INVESTING FOR THE FUTURE OF YOUR ASSOCIATION

Part of CAI-OC's
Homeowner Leader
Education Series

Wednesday, May 22nd
6:00 pm - 7:30 pm
Virtual

If you live in or manage a community association:

- Do you know where your association's Reserve funds are invested?
- Do you know if your association has a 5-year investing and expenditure plan?
- Do you know if your association has an investment policy and follows it?

Join us to learn more about:

- The need to invest Reserve funds.
- The purpose and importance of investment policy statements.
- FDIC Insured accounts versus U.S. Treasury Notes & T-Bills
- Allowable or "most commonly used" investments.
- Components of different investment types
- Tips for finding the right financial consultant for your association.

GUEST SPEAKERS



GENAE AFFRONTI

Capital Reserve Group -
Comerica Financial Advisors



RICHARD WILLIAMSON

San Lorenzo & Stadium
Lofts Community
Associations

Wednesday, May 22nd
6:00 pm - 7:30 pm

Zoom Meetings
(Meeting link will be e-mailed to
registered attendees prior to the event.)

FREE to CAI MEMBERS!
\$25 for non-members

Register online at www.caioc.org