



**DATE:**

Tuesday,  
November 15, 2022  
6:00 pm – 7:30 pm

Attend virtual on Zoom  
or in-person at:

CAI-OC Chapter Office  
1971 E. 4th St., Ste. 280  
Santa Ana, CA 92705

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



The Education Committee Presents:

## Financial Investing for the Future of Your Association

Join us to learn more about:

- The purpose and importance of investment policy statements.
- Investment policy templates.
- FDIC Insurance and FDIC Insured accounts.
- Differences between bank accounts and investment brokerage accounts.
- Allowable or “most commonly used” investments.
- Components of different investment types (terms, taxation on interest, etc.)
- Investment strategy techniques utilizing association cash flow forecasts.
- Tips for finding the right financial consultant for your association.
- Current economic forecast and how it applies to your association’s funds.



Facilitators are:

Genae Affrunti, Comerica Securities, Inc.  
Richard Williamson, San Lorenzo Community Homeowners Association,  
Covington Community Homeowners Association & Stadium Lofts

**Register online at [www.caioc.org](http://www.caioc.org)**

or mail to CAI-OC, 1971 East 4th St., Ste. 280 Santa Ana, CA 92705

### 11/15/2022 - CIE Bonus Course: Investments

Association/Mgmt. Co Name: \_\_\_\_\_

Contact: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ E-mail Address: \_\_\_\_\_

Yes - I am a CAI Member and will attend for free.

No - I am not a member and will pay the \$25 fee for the course.

Cardholder: \_\_\_\_\_

Credit Card Number: \_\_\_\_\_

Expiration Date: \_\_\_\_\_ Verification Code: \_\_\_\_\_

Please register online at [www.caioc.org](http://www.caioc.org) or send your form to:

CAI - OC

1971 E. 4th St., Ste. 280 | Santa Ana, CA 92705

Phone 714.479.1022