



ORANGE COUNTY REGIONAL  
CHAPTER

community  
ASSOCIATIONS INSTITUTE



ASPIRE  
to Inspire

# INVESTING FOR THE FUTURE OF YOUR ASSOCIATION

**Wednesday, April 12**  
**11:00am-1:30pm**  
**Hilton Costa Mesa**

## Guest Speakers:



**Genae Affrunti**

SVP/Investments, Sr. Financial  
Consultant  
Comerica Securities, Inc.



**Richard Williamson**

San Lorenzo Community, Covington  
Community & Stadium Lofts  
Community Homeowners Associations

*This program was coordinated by: Madisen Glendenning  
of Behr Paint Company, Marla Miller of Niguel Shores  
Community Association, Sara Robertson of Park West &  
Sarah Roughan.*

## 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 April 12th 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.

## REGISTRATION RATES - *Late registration after 12:00pm on 4/5/2023*

### Member Rates (early/late)

Homeowner Leader - \$45/\$60  
Community Manager - \$50/\$65  
Attendee - \$60/\$75

### Non-Member Rates (early/late)

Homeowner Leader - \$60/\$75  
Community Manager - \$65/\$80  
Attendee - \$75/\$90

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