
Telling Your Investments Story Effectively

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Key Challenges

- Bank Failures
- Access to FDIC Information
- Security Agreements
- Collateralization
- Diversification

How Do You Explain Your Investments?

- Elected Officials

- What information do you give them
- How do you convey information to them

- Executive Management

- How do you keep them informed
- What kind of involvement do they have

- Citizens

- How do they receive information

- Advisory Committees

- What role do they play

Success Stories

- Share your challenges and how you overcame them
- What roadblocks did you run into and how did you handle them
- Do you have an investment policy and how often do you review or update it

Questions?

Thank You!