



FINANCE COMMITTEE MEETING

Thursday, February 23, 2017 ~ 9:45 a.m.

Allan Hancock College - Building A 300/400 – Room – A401
800 South College Drive, Santa Maria, California 93454

1. Call to Order

2. Roll Call

3. Public Comment

Public comment not pertaining to specific agenda items is welcome at this time. If you wish to speak to any item listed, please complete a Request to Speak Card available from the executive director. It is suggested that speakers limit themselves to 5 minutes.

4. Approval of Agenda (ACTION)

4.A. Agenda for February 23, 2017

6. Discussion of Goals for the Meeting

7. Investment Advisors 2016 Performance Reports and Advisor Questions

- | | |
|--|-------------------|
| 7.A. Morgan Stanley – Mr. Eddie Murray and Mrs. Jennifer Murray | 10 to 11 AM |
| 7.B. Monarch Wealth Strategies/LPL Financial – Mr. Aaron Clark | 11 to 12:00 PM |
| 7.C. Lunch break | 12:00 to 12:15 PM |
| 7.D. Northern Trust – Mr. Louis Pisacane | 12:15 to 1:15 PM |
| 7.E. Rabobank Wealth Management – Mr. Todd McGinley | 1:15 to 2:15 PM |

9. Wrap up and Adjournment of Finance Committee (ACTION)

In compliance with the Americans with Disabilities Act, if you need assistance to participate in this meeting, please contact the Allan Hancock College Foundation office at (805) 925-2004. Please make requests 48 hours prior to the meeting in order to make reasonable arrangements to ensure accessibility to this meeting.

Susan M. Houghton
Executive Director, College Advancement

Committee Members:

Mr. Guy Walker, Treasurer
Michael Black, AHC Associate Superintendent/Vice President, Finance and Administration
Dr. Lee-Volker Cox, Director
Mr. Tom Lopez, Director
Mr. Glenn Owen, Director
Mr. Rick Velasco, Director