



**2018 Summer Educational Forum  
August 12-14, 2018 San Antonio, TX**

**Information for CPAs wishing to obtain TSBPA CPE credit**

We are registered with the Texas State Board of Public Accountancy as a CPE sponsor. This registration does not constitute an endorsement by the TSBPA as to the quality of our CPE program

**Available credit hours by day:**

Saturday

Advanced Trustee Training: Four Hours

Sunday

Workshop: Two Hours

Monday

Conference Sessions: 4.5 hours

Tuesday

Conference Sessions: 2 hours

**Prerequisites:**

Basic Trustee Training is a prerequisite for Advanced Trustee Training. There are no prerequisites required for Basic Trustee Training or conference sessions.

**The content objectives are:**

Saturday, August 11th 10:00 am to 2:30 pm Advanced Training:

- Through case studies, expand attendees' knowledge of areas of ethics and how to deal with them.
- Provide an understanding of what resources they should have to deal with ethical dilemmas at their funds.
- Provide the basics of what should be covered in a ethics policy for their fund.

Sunday, August 12th 10 am to Noon Workshop

- Broaden Attendees' awareness of trustee governance procedures.
- Provide Attendees' a basic understanding Robert's Rules of Order
- Provide an explanation of meeting best practices

Monday - Tuesday, August 13-14 Conference Sessions

- Provide a thorough discussion of various asset classes and investment strategies.
- Broaden attendees' knowledge of the forecast and outlook for investing across various asset classes.
- Strengthen attendees' understanding of various governance concerns with which they are faced.