

SCHOOL FINANCE SEMINAR SERIES

TIMELY TOPICS FOR SUPERINTENDENTS AND SCHOOL BUSINESS OFFICIALS



PREPARING THE TAX LEVY – A “HANDS-ON” APPROACH, TRUTH-IN-TAXATION, LONG RANGE PLANNING & RISK MANAGEMENT ISSUES

An ISDLAF+ User Group Informational Seminar (no charge)

SEMINAR OVERVIEW

This second in a series of ISDLAF+ User Group Seminars is for current and prospective school district Fund participants and is designed to assist Superintendents and School Business Officials in understanding basic principles of school finance and business operations. Participants will have an opportunity to use their district information to build potential tax levy scenarios, will review “Truth-in-Taxation” requirements and timelines and will be provided techniques and processes for developing meaningful Long Range Financial Plans. A general overview of the current investment markets and best practices will also be presented. Specific items that participants should bring to the seminar will be included with their registration confirmation.

COORDINATOR

Donald E. Weber, Senior Vice President, Corporate Relations, PMA Securities, Inc.

PRESENTERS

Howie Crouse, Senior Vice President, Financial Planning Services, Michael Frances, Doreen Linderman, Steve Miller, Steven P. Crouse, Greg Kubitz and Merilee McCracken, Senior Financial Consultants at PMA Securities, Inc.

CONTACT

Contact Donald E. Weber at dweber@pmanetwork.com with any questions about the seminar. Specific questions about registration for this seminar should be directed to Nicole Lee at Illinois ASBO (815) 753-9305 or nalee@iasbo.org.

INSTRUCTIONS

Indicate your attendance by checking the appropriate box below. Then fax the completed form below to **(815) 516-0184**, or register online at www.iasbo.org.

AVAILABLE SEMINAR DATES

- ☐ **Tuesday, September 30, 2014**
NIU Naperville Campus; 1120 E. Diehl Rd.
Naperville, IL 60563 | (815) 752-8990
☐ **staying for lunch** ☐ **not staying for lunch**
- ☐ **Wednesday, October 1, 2014**
Embassy Suites East Peoria; 100 Conference Center Drive
East Peoria, IL 61611 | (309) 694-0200
☐ **staying for lunch** ☐ **not staying for lunch**
- ☐ **Thursday, October 2, 2014**
☐ **staying for lunch** ☐ **not staying for lunch**
Hilton Garden Inn, 360 Regency Park Drive
O'Fallon, IL 62269 | (618) 624-4499
☐ **staying for lunch** ☐ **not staying for lunch**

Name _____

Position _____

School/Firm _____

Address _____

City _____ State _____ Zip _____

Phone _____ Fax _____

E-mail (Required) _____

SCHEDULE

- 8:30am – 9:00am | Registration and Refreshments
9:00am – 11:45am | User Group Information - Discussion - Questions and Answers
11:45am – 12:30pm | Lunch (*provided*) and Round Table Discussion
12:30pm – 2:00pm | User Group Information - Discussion - Questions and Answers

(866) 747-4477 | www.isdlafplus.com

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