Gregory-Portland Independent School District

BOARD MEMORANDUM

TO: DR. MICHELLE CAVAZOS

FROM: DR. ISMAEL GONZALEZ III

CC: BOARD OF TRUSTEES
PENNY ARMSTRONG
DR. MICHAEL NORRIS
DR. WILLIAM STOUT
DEBORAH GARZA

DATE: Monday, July 27, 2026

SUBJECT: CONSIDER APPROVAL OF INVESTMENT BROKER/DEALERS AND CONSULTANTS

PRIORITIES

PRIORITY 1: EXCEPTIONAL STUDENT PERFORMANCE
N/A
PRIOIRTY 2: HIGH PERFORMING AND ENGAGED WORKFORCE
N/A
PRIORITY 3: QUALITY SERVICE AND IMPACTFUL COMMUNITY ENGAGEMENT
N/A
PRIORITY 4: EFFICIENT AND EFFECTIVE DISTRICT AND CAMPUS OPERATIONS
4.2 Maintain fiscal viability; stewardship; and improve staff knowledge of sustainable budgeting processes

BACKGROUND INFORMATION:

Type: Consent

The board or the designated investment committee shall, at least annually, review, revise, and adopt a list of qualified brokers that are authorized to engage in investment transactions with a district. Gov't Code 2256.025.

RECOMMENDATION:

I recommend the Board approve the following Brokers/Dealers and Consultants:

1. First Public Lone Star Investment Pool
2. Frost Bank
3. Texpool
4. Kleberg Bank
5. Wells Fargo
6. Texas TERM
7. Meeder Public Funds | Patterson Group

FINANCIAL IMPACT:

N/A

BOARD RELATED POLICY:

CDA(LEGAL)

ACTION ITEM SUGGESTED MOTION (if applicable):

N/A