



**2025 WINTER CONFERENCE**  
**Business Meeting**  
**February 19, 2025**  
**Pinehurst, NC**

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## **WINTER 2025 BUSINESS MEETING AGENDA**

Recognition of Winter Conference Sponsors:

- **Premium Sponsors** – The North Carolina Capital Management Trust, NC Class, Chandler Asset Management
- **Gold Sponsors** – Wells Fargo, Civic Federal Credit Union, Davenport & Company
- **Silver Sponsors** – Bank of America, Huntington Bank, UBS Financial Services, three+one, PFM Asset Mgmt.
- **Bronze Sponsors** –Valley View Consulting, Multi-Bank Securities, J.P.Morgan | CHASE

### President's Report

- Dismiss Vendors and non-members\*
- Call to Order
- Recognition of Past Presidents
- Recognition of First Time Attendees
- Key Take-Aways from last summer's strategic planning efforts

### Treasurer's Report

- Review and approval of financial report

### Secretary's Report

- Review and approval of 2024 Summer Conference business meeting minutes

### New Business – President

- Dates for 2025 Summer Conference: July 23 - 24, 2025 in Wilmington
- Dates for 2026 Winter Conference: February 17 – 19, 2026 in Pinehurst

### Other Business – President

- Conference presentations posted on the Association website – [www.nclgia.org](http://www.nclgia.org)
- Don't forget to take advantage of the NCLGIA listserv – [nclgia@listserv.unc.edu](mailto:nclgia@listserv.unc.edu)
- Conference evaluation forms
- CPE sign in sheet and CPE credit forms
- Reminder: NCCMT Cocktail reception from 5:30-7:00

Adjourn for Lunch

*\* Vendors are asked to please excuse themselves from the business meeting.*