



**2023 SUMMER CONFERENCE**  
**JULY 19-20, 2023**  
**WRIGHTSVILLE BEACH, NC**

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## **BUSINESS MEETING AGENDA**

Recognition of Summer Conference sponsors:

- **Premium Sponsor** – North Carolina Capital Management Trust
- **Platinum Sponsors** – Civic Federal Credit Union, Public Trust Advisors
- **Gold Sponsor** – Wells Fargo, Multibank Securities, Inc, PFM Asset Management
- **Silver Sponsors** – UBS Financial Services, Davenport & Company, LLC, Bank of America
- **Bronze Sponsors** – Raymond James, Valley View Consulting, LLC, JP Morgan-Chase

Dismiss Vendors and non-members\*

Call to Order

Recognition of Past Presidents

Recognition of First Time Attendees

Vice President's Report

- Location of Summer 2024 Conference
- Dates for 2024 Winter Conference – February 4-6, 2024 in Pinehurst, NC

Treasurer's Report

- Review and approval of financial report (posted on NCLGIA website)

Secretary's Report

- Review and approval of 2023 Winter Conference business meeting minutes (posted on NCLGIA website)

New Business

- By-law changes to include Membership Coordinator position (posted on NCLGIA website)
- Board Nomination & Election of Secretary: Spencer Phillips, Wake County
- Board Nomination & Election of Membership Coordinator: Evans Ballard, Town of Mooresville  
Dates for 2024 Summer Conference- July 23-24, 2024 in Wilmington, NC
- New business proposed by membership

Other Business

- 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 Reception 5:30-7:00pm (Turtlewatch & Oceanwatch Rooms)

Adjourn for Lunch

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