2026 SUMMER CONFERENCE
Business Meeting
July 22-23
Wilmington, NC

SUMMER 2026 BUSINESS MEETING AGENDA

Recognition of Summer Conference Sponsors

- **Premium Sponsor** – The North Carolina Capital Management Trust
- **Platinum Sponsor** – North Carolina CLASS
- **Gold Sponsors** –Davenport & Company, Wells Fargo, PFM Asset Management | NCIP, First Citizens Bank, three+one
- **Silver Sponsors** –UBS Financial Services, Pinnacle Bank, JPMorgan | CHASE, Multi-Bank Securities, Huntington National Bank
- **Bronze Sponsors –**Valley View Consulting, Chandler Asset Management, Baird, First Horizon Bank,

President's Report

- Dismiss Vendors and non-members*
- Call to Order
- Recognition of Past Presidents
- Recognition of First Time Attendees

Treasurer's Report

- Review and approval of financial report

Secretary's Report

- Review and approval of 2026 Winter Conference business meeting minutes

New Business – President

- Dates for 2027 Winter Conference: February 15-17, 2027 in Pinehurst; 2028 Conference February 21-23, 2028. Note two full day conference, rather than ending at 1pm
- Discussion on continuing to reimagine and plan future of organization
    - Future Summer Conference Information
    - Cash Handling Webinar – Annual
    - Half Day Seminar's Fall 2027

Other Business – President

- Conference presentations posted on the Association website – www.nclgia.org
- Don't forget to take advantage of the NCLGIA listserv – nclgia@listserv.unc.edu; LinkedIn
- Conference evaluation forms
- CPE electronic sign-in and CPE credit forms
- Reminder: NCCMT Rooftop reception from 5:30-7:00

Adjourn for Lunch

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