



Asset and Investment Review Task Force

treasurer.utah.gov/AIR

Meeting Agenda

June 25, 2025 | 3:00 p.m. - 4:30 p.m.

IN-PERSON

Office of State Treasurer, Conference Room
350 N. State Street, Suite 170
Salt Lake City, UT 84114

VIRTUAL

Zoom: <http://bit.ly/40aEuxh>
Website Stream: treasurer.utah.gov/AIR
YouTube Stream: <https://bit.ly/USTyt>

1. Task Force Business

- Call to Order
- Introductions
- Approve Minutes of the May 23, 2025 Meeting

2. Investment Study Procurement

The State Treasurer will provide an update on the solicitation for a vendor to conduct a study that examines investment strategies for public funds.

- Marlo Oaks, State Treasurer of Utah

3. Public Entity Reserves Data

The Task Force will hear a presentation from the Office of State Auditor on updates to data discussed during the first Task Force meeting. The Task Force will discuss additional data needs and strategies.

- Alex Nielson and Marcie Mortensen, Office of State Auditor
- Task Force Discussion on Data Needs and Strategy

4. Other Business/Adjournment

- Discuss future meeting topics
- Adjourn