



# Asset and Investment Review Task Force

[treasurer.utah.gov/AIR](http://treasurer.utah.gov/AIR)

## Meeting Agenda

August 15, 2025 | 10 a.m. - 11:30 a.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/3UYM632>  
Website Stream: [treasurer.utah.gov/AIR](http://treasurer.utah.gov/AIR)  
YouTube Stream: <https://bit.ly/USTyt>

#### **1. Task Force Business**

- Call to Order
- Introductions
- Approve Minutes of the June 25, 2025 Meeting

#### **2. Investment Study Procurement**

*The State Treasurer has contracted with Tur Partners, working with the University of Chicago, 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 Draft Survey
- Task Force Discussion on Data Needs, Strategy, and Observations

#### **4. Other Business/Adjournment**

- Discuss future meeting topics
- Adjourn