



Asset and Investment Review Task Force

treasurer.utah.gov/AIR

Meeting Agenda

September 30, 2025 | 3 p.m. - 4:30 p.m.

IN-PERSON

Capitol Board Room
350 N. State Street, Second Floor
Salt Lake City, UT 84114

VIRTUAL

Zoom: <http://bit.ly/3KjPxPW>
Website Stream: treasurer.utah.gov/AIR
YouTube Stream: <https://bit.ly/USTyt>

1. Task Force Business

- Call to Order
- Approve Minutes of the August 15, 2025 Meeting

2. Investment Study

The Task Force will hear an interim presentation on the study being conducted by the University of Chicago, in partnership with Tur Partners, to evaluate whether placing a portion of public reserves on deposit at local banks can provide added value to Utah's economy.

- Nidhi Srivastava, University of Chicago
- Patrick Daley, Tur Partners
- Mark Stisser, Tur Partners

3. Public Entity Reserves Data

The Task Force will hear a presentation from the Office of State Auditor on the Asset & Investment Data Explorer and survey results, followed by a discussion on findings, data needs, and strategic observations.

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

4. Other Business/Adjournment

- Discuss future meetings
- Adjourn