



# Asset and Investment Review Task Force

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

## Meeting Agenda

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

### IN-PERSON

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

### VIRTUAL

Zoom: <https://bit.ly/47cgk9O>  
Website Stream: [treasurer.utah.gov/AIR](https://treasurer.utah.gov/AIR)  
YouTube Stream: <https://bit.ly/USTyt>

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

- Call to Order
- Approve Minutes of the September 30, 2025 Meeting

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

*The Task Force will hear a presentation on the study 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
- Lindsay Mueller, 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. Discuss Final Report**

*The Task Force will discuss data, analysis, and recommendations to include in the final report.*

#### **5. Other Business/Adjournment**

- Discuss Final Meeting (November 21, 2025 at 9 a.m.)
- Adjourn