



CITY OF PORTLAND
OFFICE OF
MANAGEMENT AND FINANCE

**Public Finance &
Treasury Division**
1120 SW Fifth Ave., Ste. 1250
Portland, OR 97204
(503) 823-4220
FAX (503) 823-4209

Investment Advisory Committee Meeting

August 15, 2014
12:00 pm

PORTLAND BUILDING

1120 SW 5th Ave., 12th Fl.
Horizon Conference Room
Portland, OR 97204

Agenda

Update on Socially Responsible Investing

Annual review of City's Investment Policy. Potential changes include:

- Add Supranationals
- Adjust portfolio WAM limit
- Add acknowledgment that Council may periodically approve a do-not-buy list for Treasury to incorporate into investment procedures
- Add statement that we do not believe we are receiving advice from City's approved broker/dealers (MA Rule)

Review City's investment portfolio

Other