



***CIWM Winter Board Meeting***  
**Wednesday, February 23<sup>rd</sup> 2011**  
**The Paul Merage School of Business**

**Board Meeting (3:30 PM)**  
**Location: Executive Commons**

- Merage School 2011 update
- Co – Chair reports – Pat Soldano and Rick Keller
- Committee reports
  - Investment Management Programs – Joe Volz
  - Wealth Management Programs – David Young
  - Professional Programs – Shaun Skeris
  - Membership – Kimberly Dwan Bernatz
- Financial Literacy Program – Mark Moehlman
- Research Salon – Rick Keller

**Speaker Presentation (5:00 PM)**  
**Municipal Bonds**

**John Moorlach, Vice Chairman, Orange County Board of Supervisors**  
**Scott Romans PhD, Portfolio Manager, Nuveen Investments**  
**Jeffrey Cleveland, Senior Economist, Payden & Rygel**