

**California Society of Municipal Analysts**  
**Fall 2000 Conference -- Preliminary Program**

**Wednesday & Thursday, October 4-5, 2000**

**Pre-Conference Events**  
**Wednesday, October 4, 2000**

- 3:00 - 5:00**     **Port of Oakland Tour** – Meet in the lobby of the Port of Oakland administration building, 530 Water Street, Oakland. [From San Francisco, the Port's headquarters can be reached easily by taking the Oakland/Alameda ferry. The ferry departs from the San Francisco Ferry Building at 2:00 and arrives at Jack London Square 2:30. The Port's offices are directly in front of the ferry pier.]
- 6:00 - 8:00**     **Pre-Conference Dinner** – We will be having drinks and dinner at a casual restaurant in Oakland within walking distance of the Port's offices. Exact location to be announced shortly.

**Conference Day Schedule**  
**Thursday, October 5, 2000**  
**World Trade Club**  
**Ferry Building, Embarcadero at Market Street**  
**San Francisco**

- 8:30 - 9:00**     **Registration and Continental Breakfast**
- 9:00 - 9:05**     **Welcome & Opening Remarks** – Ken Kurtz, CSMA Chair
- 9:05 - 9:45**     **The Business of the NFMA** – Although the CSMA is a constituent organization of the National Federation of Municipal Analysts, the NFMA remains a mystery to many CSMA members. This panel will provide an overview of and update on the NFMA's education program, work on disclosure, annual conferences, and other activities.

Jeff Wilson, Chair, NFMA Disclosure Committee  
Peter Bianchini, Program Chair, NFMA 2001 Annual Conference  
Ken Kurtz, CSMA Chair

- 9:45 - 11:00**     **Portfolio Managers' Perspective** -- This panel will provide insight into the municipal bond portfolio management process. The three panelists each have different goals and employ unique strategies in managing their portfolios. The types of funds managed by the panelists include high yield/credit focussed, money market, and current income focussed. The portfolio managers will discuss their approach, strategy, and will present case studies.

Steven M. Permut - Vice-President and Senior Portfolio Manager, American Century  
Stella Wong – Vice-President and Portfolio Manager, Franklin Templeton  
Kevin Shaughnessy, CFA – Portfolio Manager, Charles Schwabb  
Moderator: Eric Friedland – Director, FSA

**11:15 - 12:15 Earthquake Risk: Have We Become Too Complacent?**

Robert, Philbrick, Director, EQE International  
Rick Leffingwell, Director, Office of Financing and Treasury, California State  
University  
Representative, USGS (invited)  
Moderator: Tom McLoughlin, MBIA

**12:30 - 1:45 Lunch – Keynote Speaker: Hon. Willie Brown, Mayor, City and County of San Francisco** (confirmed)

**2:00 - 3:00 Initiative Risk in the Northwest** – It’s not just California! Oregon has long had an active initiative process which has created fiscal challenges for the state and local governments. Ballots measures in Washington and Alaska suggest that these states may be travelling down the same road. Hear about recent and upcoming initiatives in these three states and how three cities are dealing with them.

Ken Rust, City of Portland  
Dwight Dively, Director, Executive Services Department, City of Seattle  
Representative, City of Anchorage (invited)  
Moderator: Ken Kurtz, Moody’s Investors Service

*Business casual attire is acceptable for all CSMA events.*

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**Fall 2000 Conference**

**Registration Form**

Place: World Trade Club  
Ferry Building  
Embarcadero at Market Street  
San Francisco

Date: Thursday, October 5, 2000

Time: 9:30 am to 2:45 pm

Cost: CSMA Members (regular and associate) -- \$60  
Non-members -- \$65

Name: \_\_\_\_\_

Firm: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_

Lunch Preference: Chicken: \_\_\_\_\_ Fish: \_\_\_\_\_ Vegetarian: \_\_\_\_\_

CSMA Member: \_\_\_\_\_ Non-Member: \_\_\_\_\_

Pre-Conference Events:

Will you be attending the Port of Oakland tour on October 4? Yes: \_\_\_\_\_ No: \_\_\_\_\_

Will you be attending the pre-conference dinner on October 4? Yes: \_\_\_\_\_ No: \_\_\_\_\_

Please return this form along with a check payable to the California Society of Municipal Analysts (\$60 for CSMA members and \$65 for non-members), by September 22, 2000, to:

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