



Investment Advisory Services Extension

PRESENTED TO THE CITY COUNCIL ON

JUNE 16, 2025

Summary

- **Investment advisory services**
 - Provides monthly and quarterly investment reports
 - Identifies investment opportunities and upcoming risks
- **Valley View Consulting, L.L.C.**
 - City's current contract was executed in August 2023 for a service period of 2 years
 - Staff would like to extend this agreement for two years
 - The cost for two years will not exceed \$115,000



Questions, Comments & Direction

Next Step

- Approve or Deny the two-year extension
- Staff recommends approval