



Levy County Board of County Commissioners Agenda Item Summary Form

1. **Name:** Jared Blanton
2. **Organization/Title/Telephone:** Clerk & Comptroller/Finance Officer/5266
3. **Meeting Date:** Tuesday, February 20, 2024
4. **Requested Motion/Action:**
Investment Update for Fiscal Year 2023 and First Quarter of FY 24
5. **Agenda Presentation:** Yes No N/A
6. **Time Requested:** 15 minutes
(Request will be granted if Possible) allotted time not more than 15 minutes
7. **Is this Item Budgeted (If Applicable):** Yes No N/A
8. **If no, State Action Required:**
 - a. **Budget Action:** NONE
 - b. **Financial Impact Summary Statement:** Summary/Housekeeping item
 - c. **Detailed Analysis Attached:** Yes
 - d. **Budget Officer Approval:** Yes

If approved enter date: 2/14/2024

9. **Background: (Why is the action necessary, and what action will be accomplished) (All supporting documentation must be attached if any)**

This is the yearly update given to the Commission about the status of the investments for the Board of County Commissioners. This is required by law and policy as part of a compliant investment program.

10. Recommended Approval

- a. **Department Director:** Yes No N/A
- b. **County Attorney:** Yes No N/A
- c. **County Coordinator:** Yes No N/A
- d. **Other (Clerk & Comptroller as Budget Officer):** Yes No N/A