



Levy County Board of County Commissioners Agenda Item Summary Form

1. **Name:** Jared Blanton
2. **Organization/Title/Telephone:** Levy Clerk/Finance Officer
3. **Meeting Date:** Tuesday, November 22, 2022
4. **Requested Motion/Action:**
Approving Resolution (2022-065) Adopting an Amended Investment Policy and Providing for and Effective Date
5. **Agenda Presentation:** Yes No N/A
6. **Time Requested:** Click or tap to enter a date.
(15 minutes)
7. **Is this Item Budgeted (If Applicable):** Yes No N/A
8. **If no, State Action Required:**
- a. **Budget Action:** See Related Budget Amendment Resolution #2022-071
 - b. **Financial Impact Summary Statement:** Yes
 - c. **Detailed Analysis Attached:** Yes
 - d. **Budget Officer Approval:** Yes

If approved enter date: 11/22/2022

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

This Resolution is a required for the County to allow the Clerk to engage the services of a professional Investment Advisor to assist in the management of the County's investment funds and recommends the Board adopt an amended Investment Policy to reflect that authority and to make other updates to the existing Investment Policy.

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:** Yes No N/A