



College Station Independent School District

Success...each life...each day...each hour

MEMORANDUM

To: Dr. Eddie Coulson, Superintendent

From: Glynn Walker, Deputy Superintendent

Date: January 14, 2014

Subject: Consider approval of Financial Advisory agreement with Southwest Securities

Agenda Item: J-2

Board Priority/
District Goal: Priority 3, Goal 5

BACKGROUND

Southwest Securities has provided College Station ISD with financial advisory services for many years. Mr. Victor Quiroga has been the individual most recently responsible for providing those services. This firm has a long history of providing excellent service to College Station ISD. They have assisted in monitoring of the district's debt portfolio, along with making us aware of and initiating debt refunding opportunities resulting in lowering the District's total interest costs.

The five-year professional services Financial Advisory Contract with Southwest Securities will expire in April of this year. Southwest Securities has proposed a new five-year contract for our consideration.

RECOMMENDATION

It is recommended the College Station Board of Trustees consider approval of the Financial Advisory contract with Southwest Securities.

A handwritten signature in blue ink, appearing to read "Glynn Walker".

GLYNN WALKER
Deputy Superintendent for
Human Resources and Business

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A handwritten signature in blue ink, appearing to read "Eddie Coulson", with the date "1-17-2014" written below it.

EDDIE COULSON, Ed.D.
Superintendent of Schools