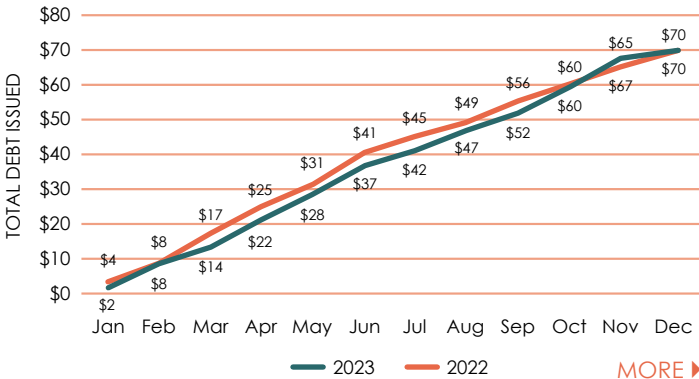


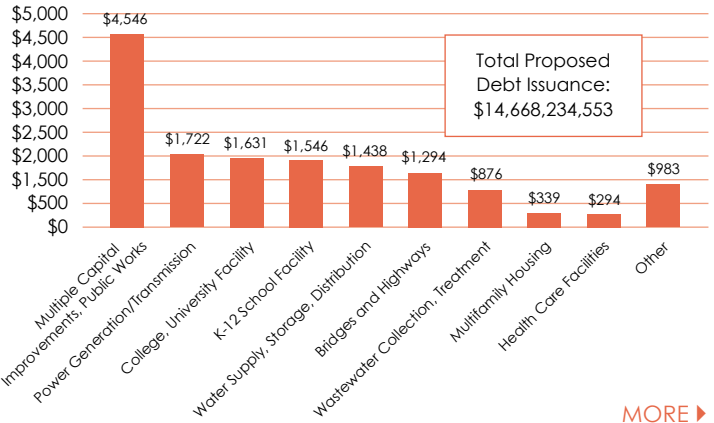
## California Public Debt Issuance Monthly Data

CUMULATIVE CALIFORNIA PUBLIC DEBT ISSUANCE (IN BILLIONS)<sup>1</sup>



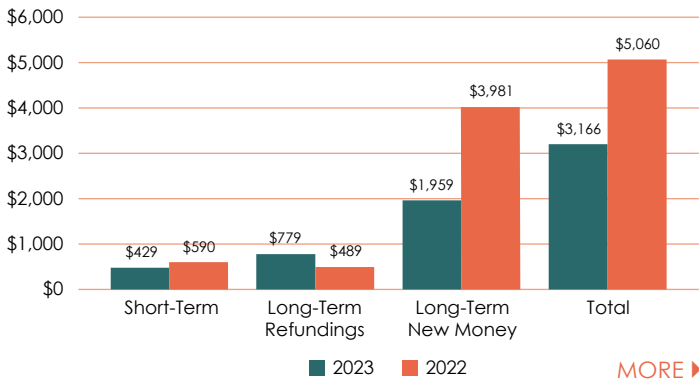
[MORE ▶](#)

REPORTS OF PROPOSED DEBT ISSUANCE RECEIVED  
1-1-2024 THROUGH 1-31-2024, BY PURPOSE (IN MILLIONS)



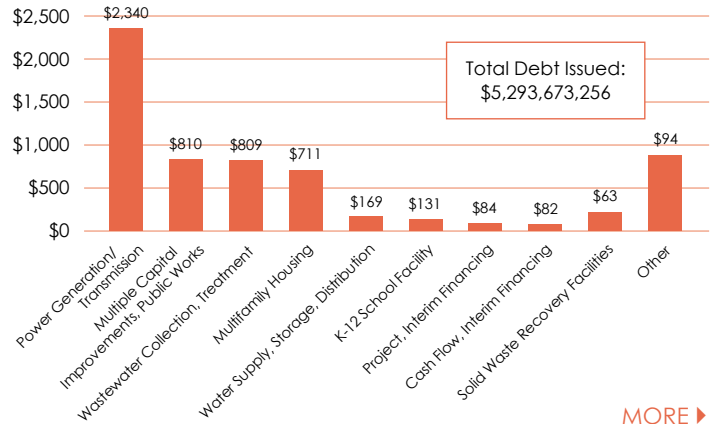
[MORE ▶](#)

CALIFORNIA PUBLIC DEBT ISSUANCE, NOVEMBER (IN MILLIONS)<sup>1</sup>



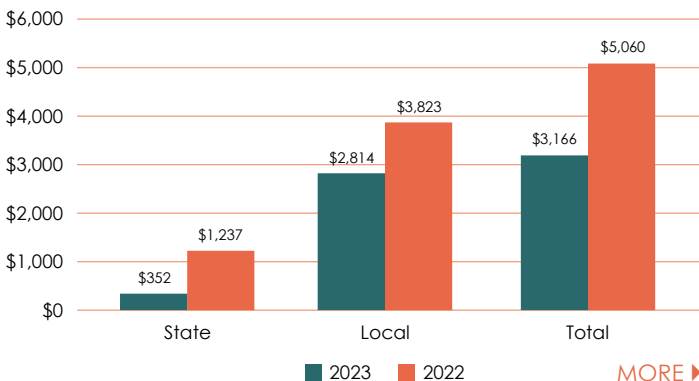
[MORE ▶](#)

TOTAL REPORTS OF FINAL SALE RECEIVED  
1-1-2024 THROUGH 1-31-2024, BY PURPOSE (IN MILLIONS)



[MORE ▶](#)

STATE\* VERSUS LOCAL DEBT ISSUANCE, DECEMBER (IN MILLIONS)<sup>1</sup>



[MORE ▶](#)

\* State issuers include the State of California, its agencies, commissions, authorities, departments and The Student Loan Corporation.

<sup>1</sup> Data may not include issuances reported after the 22<sup>nd</sup> day of the following month.

More detailed debt issuance information is available in the monthly [Debt Line Calendar](#). **DL**

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*Debt Line* publishes articles on debt financing and public fund investment that may be of interest to our readers; however, these articles do not necessarily reflect the views of the Commission.

Business correspondence and editorial comments are welcome.

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# DATA - CORNER

A Monthly Update From CDIAC's Data Collection and Analysis Unit

## Top Municipal Financing Team Participants: Calendar Year 2023

Jean Shih | Policy Research Unit

The California Debt and Investment Advisory Commission (CDIAC) receives Reports of Final Sale (RFS) for debt issued by state and local agencies in California. Twice a year (mid-year and annually), CDIAC compiles the data submitted on these reports to reveal California's top municipal financing team participants, specifically bond counsels, financial advisors, and underwriters.

Based on the information reported as part of the RFS, CDIAC has ranked the top financing team participants based on volume (par amount issued) and number of issues for calendar year (CY) 2023.<sup>1</sup> California state and local agencies reported 1,247 issues totaling approximately \$66.9 billion in long and short-term debt for CY 2023. This volume represents a 0.5% decrease in total volume issued when compared to CY 2022. Comparatively, municipal bond issuance nationwide by volume decreased 2.6% over the previous year.<sup>2</sup>

Midway through 2022, CDIAC debuted the Data Portal, a new cloud-based online filing system for reporting debt issuance. The Data Portal allows users to file reports without splitting the debt according to the federal tax status of the proceeds issued (i.e. tax-exempt and taxable series). As a result, for this report the number of RFS for CY 2022 has been revised to a total of 1,375 (CY 2022 Issues) by combining debt issues that were split into multiple RFS (i.e. tax-exempt and taxable series) in addition to filtering out local obligations issued as part of a Mark-Roos pool. The number of RFS for CY 2023 was revised to 1,247 by filtering out local obligations issued as part of a Mark-Roos pool, however, due to the features of CDIAC's new data portal system, debt issuances were not combined if a user voluntarily chose to split the debt issue into more than one report.<sup>3</sup>

## BOND COUNSELS

### Volume Issued

When ranked by volume, Orrick Herrington & Sutcliffe LLP (Orrick) continued to be the highest ranking bond counsel with almost \$31 billion, representing 46.3% of the volume in CY 2023. Orrick's volume held such a considerable lead that it was great-

<sup>1</sup> California issuance numbers include all debt reported to CDIAC as of January 19, 2024, with a sale date occurring in calendar year 2023. The data includes long-term and short-term financings and private placements but does not include local obligation debt issued as part of a Mark-Roos pool.

<sup>2</sup> U.S. Municipal Bonds Statistics, distributed by the Securities Industry and Financial Markets Association, [www.sifma.org/resources/research/us-municipal-issuance/](http://www.sifma.org/resources/research/us-municipal-issuance/), accessed January 2023.

<sup>3</sup> For CY 2023, there are 72 issues that have split the debt issuance into more than one report.

## 2023 TOP BOND COUNSEL FIRMS (BY PAR AMOUNT), AS REPORTED TO CDIAC

| BOND COUNSEL                                  | NO. OF ISSUES  | PAR AMOUNT               | % OF TOTAL NO. OF ISSUES | CHANGE FROM 2022 (ISSUES)* | % OF TOTAL VOLUME | CHANGE FROM 2022 (VOLUME)* |
|---|----------------|--------------------------|--------------------------|----------------------------|-------------------|----------------------------|
| Orrick Herrington & Sutcliffe LLP             | (1) 378        | \$30,957,958,237         | 29.7%                    | ↔                          | 46.3%             | ↔                          |
| Stradling Yocca Carlson & Rauth               | (3) 201        | 9,115,033,932            | 15.8                     | ↔                          | 13.6              | ↔                          |
| Jones Hall, A Professional Law Corporation    | (2) 280        | 6,035,358,527            | 22.0                     | ↔                          | 9.0               | ↔                          |
| Nixon Peabody LLP                             | 19             | 3,652,725,393            | 1.5                      | NR                         | 5.5               | ↑ +1                       |
| Norton Rose Fulbright US LLP                  | 21             | 3,607,535,000            | 1.7                      | NR                         | 5.4               | ↑ +2                       |
| Hawkins Delafield & Wood LLP                  | 35             | 2,995,579,732            | 2.8                      | ↓ -1                       | 4.5               | ↔                          |
| Kutak Rock LLP                                | (4) 68         | 2,388,124,066            | 5.3                      | ↔                          | 3.6               | ↓ -3                       |
| Squire Patton Boggs (US) LLP                  | 10             | 1,343,265,000            | 0.8                      | NR                         | 2.0               | ↔                          |
| Dannis Woliver Kelley                         | 30             | 911,455,000              | 2.4                      | NR                         | 1.4               | ↑ +1                       |
| Rutan & Tucker LLP                            | 4              | 877,096,672              | 0.3                      | NR                         | 1.3               | NR                         |
| Quint & Thimmig LLP                           | (5) 36         | 752,612,180              | 2.8                      | NR                         | 1.1               | ↓ -6                       |
| All Other Issues with a Bond Counsel Reported | 123            | 2,228,088,460            | 9.7                      |                            | 3.3               |                            |
| Issues with No Bond Counsel Reported          | 42             | 2,043,894,180            | 5.3                      |                            | 3.1               |                            |
| <b>TOTAL NET ISSUES</b>                       | <b>1,272**</b> | <b>\$ 66,908,726,380</b> | <b>100</b>               |                            | <b>100</b>        |                            |

Totals may not add due to rounding.

\* This column shows the number of spots the firm moved in rank from 2022.

\*\*If an issue reported a bond counsel and co-bond counsel, both were counted in the number of issues, however, the par amount was assigned to the firm identified as bond counsel on the RFS. There were 25 issues in 2023 that reported both a bond counsel and co-bond counsel.

NR identifies firm outside the prior year ranking.

er than the combined volume of the remaining bond counsels in the top 10 (ranks two through ten). Stradling Yocca Carlson & Rauth (Stradling) remained in second place with 13.6% of volume, a 9.9% increase from CY 2022. Also remaining in the same rank is Jones Hall, in third place with just over \$6 billion, a 1.8% increase from CY 2022. Nixon Peabody LLP rose one rank to fourth place with 5.5% and Norton Rose Fulbright US LLP rose two ranks to fifth place with 5.4% of the volume issued.

### Number of Issues

In 2023, over 94% of issues reported having a bond counsel as part of the debt financing team. Orrick was the top ranking bond counsel firm with 378 issues, representing 29.7% of all issuances, maintaining the same rank as the year prior. Jones Hall, A Profes-

sional Law Corporation (Jones Hall) was in second place with 282 issuances (22%), also maintaining the same rank as 2022. The two firms together participated in 51.7% of all 2023 issuances. Stradling and Kutak Rock LLP remained in third and fourth place with 15.8% and 5.3% issuances, respectively. While not ranked in the top 10 in CY 2022, Quint & Thimmig LLP placed fifth with 2.8% of all issues in CY 2023.

### FINANCIAL ADVISORS

#### Volume Issued

For the seventh year in a row, Public Resources Advisory Group (PRAG) was the leading financial advisory firm by volume issued, providing financial advisory services on \$13 billion or 19.5% of the debt issued in CY 2023. The PFM Group/Public

Financial Management Inc. moved up two ranks to second place, participating in 17.2% of debt issuance transactions. KNN Public Finance LLC dropped one rank to third place with \$6.8 billion (10.2%) in volume issued. Backstrom McCarley Berry & Co. moved up to fourth place from not ranking the previous year, with \$3.4 billion in issuance, representing 5.1% of volume issued. Fieldman Rolapp & Associates Inc. moved up one rank to fifth place by volume with approximately \$3.3 billion (4.9%) in issuance in CY 2023.

#### Number of Issues

Financial advisors participated on approximately 51.9% of total issues reported to CDIAC during CY 2023. The top four financial advisory firms remained in the same rank as the prior year, despite slight shifts in the

## 2023 TOP FINANCIAL ADVISOR FIRMS (BY PAR AMOUNT), AS REPORTED TO CDIAC

| FINANCIAL ADVISOR                                  | NO. OF ISSUES | PAR AMOUNT       | % OF TOTAL NO. OF ISSUES | CHANGE FROM 2022 (ISSUES)* | % OF TOTAL VOLUME | CHANGE FROM 2022 (VOLUME)* |
|--|---------------|------------------|--------------------------|----------------------------|-------------------|----------------------------|
| Public Resources Advisory Group (PRAG)             | 26            | \$13,055,630,000 | 2.0%                     | NR                         | 19.5%             | ↔                          |
| PFM Financial Advisors LLC/The PFM Group           | (4) 58        | 11,538,241,896   | 4.6                      | ↔                          | 17.2              | ↑ +2                       |
| KNN Public Finance LLC                             | (3) 64        | 6,839,219,138    | 5.0                      | ↔                          | 10.2              | ↓ -1                       |
| Backstrom McCarley Berry & Co.                     | 18            | 3,430,745,000    | 1.4                      | NR                         | 5.1               | ↑ +6                       |
| Fieldman Rolapp & Associates Inc.                  | (2) 78        | 3,284,908,413    | 6.1                      | ↔                          | 4.9               | ↑ +1                       |
| Municipal Capital Markets Group Inc                | 3             | 2,995,355,000    | 0.2                      | NR                         | 4.5               | NR                         |
| Montague DeRose & Associates                       | 28            | 2,419,992,825    | 2.2                      | NR                         | 3.6               | ↓ -7                       |
| Isom Advisors, A Division of Urban Futures, Inc.   | (1) 80        | 1,757,257,639    | 6.3                      | ↔                          | 2.6               | ↔                          |
| Keygent LLC  | 26            | 1,669,335,000    | 2.0                      | NR                         | 2.5               | NR                         |
| Dale Scott & Company Inc.                          | (5) 47        | 1,330,612,040    | 3.7                      | NR                         | 2.0               | NR                         |
| All Other Issues with a Financial Advisor Reported | 231           | 8,474,585,727    | 18.2                     |                            | 12.7              |                            |
| Issues with No Financial Advisor Reported          | 610           | 10,112,843,702   | 48.1                     |                            | 15.1              |                            |
| TOTAL NET ISSUES                                   | 1,269**       | \$66,908,726,380 | 100%                     |                            | 100%              |                            |

Totals may not add due to rounding.

\* This column shows the number of spots the firm moved in rank from 2022.

\*\*If an issue reported multiple financial advisors, including co-financial advisors, each firm was counted in the number of issues, however, the par amount was assigned to the firm identified as financial advisor on the RFS. In 2023, 21 firms were listed with two financial advisors and one issue listed two financial advisors.

NR identifies firm outside the prior year ranking.

number of issues issued. Isom Advisors, A Division of Urban Futures, Inc. was California's top financial advisory firm by number of issues in CY 2023 with 80 or 6.3% of issues. Although Isom Advisors' rank remained the same as CY 2022, its number of issuances decreased 27.9% in CY 2023. Fieldman Rolapp & Associates Inc. remained in second place with 78 or 6.1% of issues. KNN Public Finance remained in third place with 5% of issues, representing a slight increase from 4.4% of issues in CY 2022. PFM Financial Advisors LLC/The PFM Group (PFM) remained in fourth place with 4.6% of issues, and Dale Scott & Company Inc. moved up to fifth place (3.7%) after not ranking in the prior year.

## UNDERWRITERS

### Volume Issued

When ranked by volume, Morgan Stanley & Co. LLC took the top underwriting spot for CY 2023 participating in 10.6% of total volume issued, moving up seven ranks from the prior year. Bank of America moved up two ranks to take the second-place spot in CY 2023 with \$6.7 billion, representing 10.1% in volume. Citigroup Global Markets Inc. fell one rank to third place in CY 2023 with 8.8% of volume issued. Wells Fargo Bank National Association also dropped one rank, moving to fourth place with 8.1% of volume issued. Goldman Sachs & Company took fifth place by volume with \$5.2 billion in issuance, representing 7.8% of total volume issued in 2023.

### Number of Issues

Underwriters participated in 56% of all debt issuances reported to CDIAC during the CY 2023. For the ninth year in a row, Stifel Nicolaus & Company Inc. ranked first as the leading underwriter by number of issues with approximately 8.5% of issues issued in CY 2023, the same percentage as CY 2022. RBC Capital Markets LLC and Piper Sandler & Co. remained in second and third place with 69 issues (4.7%) and 68 issues (4.6%) respectively. Raymond James & Associates Inc. moved up to fourth rank with 63 issues (4.3%) from not ranking the previous year. Also, Morgan Stanley & Co. LLC moved up to fifth rank with 60 issues (4.1%) from not ranking the previous year.

## 2023 TOP UNDERWRITER FIRMS (BY PAR AMOUNT), AS REPORTED TO CDIAC

| UNDERWRITER                                   | NO. OF ISSUES | PAR AMOUNT       | % OF TOTAL NO. OF ISSUES | CHANGE FROM 2022 (ISSUES)* | % OF TOTAL VOLUME | CHANGE FROM 2022 (VOLUME)* |
|---|---------------|------------------|--------------------------|----------------------------|-------------------|----------------------------|
| Morgan Stanley & Co. LLC                      | (5) 60        | \$7,090,560,000  | 4.1%                     | NR                         | 10.6%             | ↑ +7                       |
| Bank of America Merrill Lynch                 | 58            | 6,729,470,000    | 4.0                      | NR                         | 10.1              | ↑ +2                       |
| Citigroup Global Markets Inc.                 | 30            | 5,916,028,219    | 2.0                      | NR                         | 8.8               | ↓ -1                       |
| Wells Fargo Bank National Association         | 38            | 5,428,163,000    | 2.6                      | NR                         | 8.1               | ↓ -1                       |
| Goldman Sachs & Company                       | 23            | 5,240,035,000    | 1.6                      | NR                         | 7.8               | ↑ +1                       |
| Barclays Capital Inc.                         | 47            | 3,786,670,000    | 3.2                      | ↓ -2                       | 5.7               | ↓ -2                       |
| RBC Capital Markets LLC                       | (2) 69        | 3,590,939,000    | 4.7                      | ↔                          | 5.4               | ↔                          |
| Stifel Nicolaus & Company Inc.                | (1) 124       | 3,174,431,398    | 8.5                      | ↔                          | 4.7               | ↓ -3                       |
| JP Morgan Securities LLC                      | 36            | 3,081,266,000    | 2.5                      | ↓ -5                       | 4.6               | ↔                          |
| Jefferies LLC                                 | 19            | 2,531,715,000    | 1.3                      | NR                         | 3.8               | NR                         |
| Piper Sandler & Co.                           | (3) 68        | 2,035,293,312    | 4.6                      | ↔                          | 3.0               | ↓ -1                       |
| Raymond James & Associates Inc.               | (4) 63        | 1,630,220,665    | 4.3                      | NR                         | 2.4               | NR                         |
| All Other Issues with an Underwriter Reported | 217           | 6,426,379,154    | 14.8                     |                            | 9.6               |                            |
| Issues with No Underwriter Reported           | 612           | 10,247,555,632   | 41.8                     |                            | 15.3              |                            |
| TOTAL NET ISSUES                              | 1,464**       | \$66,908,726,380 | 100%                     |                            | 100%              |                            |

Totals may not add due to rounding.

\* This column shows the number of spots the firm moved in rank from 2022.

\*\*If an issue reported multiple underwriters, each firm was counted in the number of issues, however, the par amount was assigned to the firm identified as the lead underwriter on the RFS or official statement. In 2022, 63 issues identified multiple underwriters. The multiple underwriters ranged from 2 to 21 underwriters per issue.

NR identifies firm outside the prior year ranking.

DL

## Chat Data Portal Tips INSIDER GUIDANCE ON SUBMITTING DATA TO CDIAC

**NEW FEATURE! REPORTING HISTORY & UPLOADED DOCUMENTS:** Registered users of the Data Portal may notice a new feature on their dashboard to view the Reporting History or Uploaded Documents for both Issuance and Ongoing reports that have been filed using the Data Portal beginning June 20, 2022. To use this new feature:

1. Select an approved **Issuer**
2. Under the **Quick Actions** section of the Dashboard - click **Reporting History & Uploaded Documents**
3. Enter the **CDIAC number** associated with the Issuer selected
4. Choose either **Reporting History** or **Uploaded Documents**
5. Click **Search**

Reporting History will display a list of the reports that have been filed in Data Portal for the CDIAC number entered. The list defaults with the most recent report filed at the top of the list. The information provided includes: the fiscal year (FY) end date

(applicable to ongoing reports), a link to a PDF of the report, the Status of the filing, the date the report was created, and the user that created the report.

**NOTE:** Reports filed in CDIAC's old online reporting system before June 20, 2022 - the date when the current Data Portal debuted - will not be displayed.

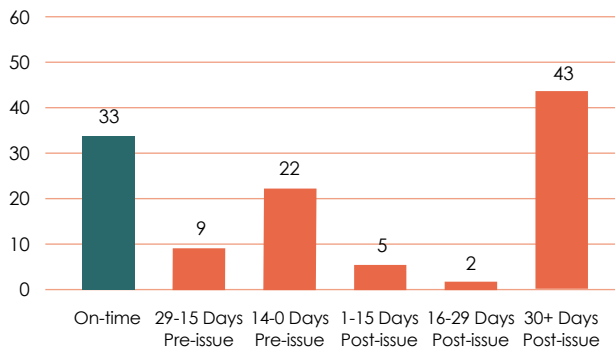
Uploaded Documents will provide a list of the documents uploaded within a report. The information includes the source of the document (usually the Report of Final Sale), the type of document, the file name and link to a PDF of the document, the date the document was uploaded, and the user that uploaded the document.

**NOTE:** Documents uploaded for Mello-Roos Yearly Fiscal Status Reports filed in CDIAC's old online reporting system before June 20, 2022 - the date when the current Data Portal debuted - will not be displayed.

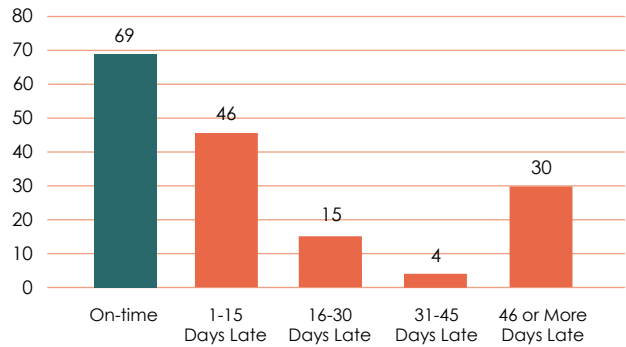
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## TIMELINESS OF SUBMITTAL OF REPORTS

REPORTS OF PROPOSED DEBT ISSUANCE (RPDI)<sup>1</sup>  
RECEIVED DECEMBER 2023



REPORTS OF FINAL SALE (RFS)<sup>2</sup>  
RECEIVED DECEMBER 2023



## DATA UNIT ACTIVITY DECEMBER 2023

- ✓ RECEIVED AND PROCESSED **14** RPDI
- ✓ RECEIVED AND PROCESSED **64** RFS
- ✓ RECEIVED **27** MARKS-ROOS YEARLY FISCAL STATUS REPORTS FOR FY 2022-23
- ✓ RECEIVED **15** MELLO-ROOS YEARLY FISCAL STATUS REPORTS FOR FY 2022-23
- ✓ RECEIVED **720** ANNUAL DEBT TRANSPARENCY REPORTS FOR FY 2022-23\*

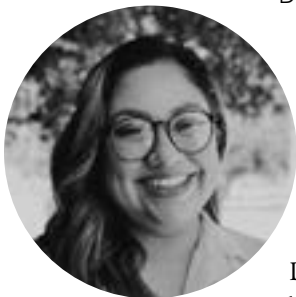
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<sup>1</sup> California Government Code Section 8855(i) states that the issuer of any proposed debt issue of state and local government shall, no later than 30 days prior to the sale of any debt issue, submit a report of proposed issuance to the commission by any method approved by the commission.

<sup>2</sup> California Government Code Section 8855(j) states that the issuer of any debt issue of state or local government, not later than 21 days after the sale of the debt, shall submit a report of final sale to the commission by any method approved by the commission.

\* As of 2/15/2023, a total of 8,259 Annual Debt Transparency Reports had been filed for the FY 2022-23 reporting period.

## CDIAC Staff Announcements



DARLENE MEDRANO was appointed as the new Research Data Analyst II for CDIAC's Policy Research Unit in February of 2024. Darlene earned a Bachelor of Arts degree in Economics with a Minor in Political Science from the University of California, Merced and a Master of Public Policy and Data Analytics Certificate from the University of California, Los Angeles Luskin School of Public Affairs. Previously, she worked as a Research Data Analyst I for the Employment Development Department conducting data analysis, legislative analysis and forecasts on the Paid Family Leave program. Darlene

is proficient in Spanish and taught herself how to use R while working with large data sets. Some of Darlene's interests include camping, hiking, spending time outdoors with her family. Welcome to CDIAC, Darlene!

DL



# Regulatory Activity Calendar

## JANUARY 2024

- 5 Due date for comments on the Governmental Accounting Standards Board's (GASB) exposure draft that would establish requirements for certain types of capital assets to be disclosed separately for purposes of note disclosures. The exposure draft, Disclosure and Classification of Certain Capital Assets, also establishes requirements for certain capital assets to be classified as "held for sale." [GASB Exposure Draft](#).
- 8 The GASB issued guidance that requires governments to disclose essential information about risks related to vulnerabilities due to certain concentrations or constraints. The requirements are effective for all fiscal years beginning after June 15, 2024. [GASB Statement](#).
- 12 The MSRB filed with the SEC proposed amendments to MSRB G-14 to shorten the timeframe for trades to be reported to the MSRB. The amendments change the current 15-minute standard to as soon as practicable, but no later than one minute after the time of trade, subject to exceptions for manual trades and firms with limited municipal trading activity. [Proposed Rule](#).

## FEBRUARY 2024

- 6 The Securities Exchange Commission (SEC) adopted two rules that require market participants who engage in certain dealer roles to register with the SEC, become members of a self-regulatory (SRO), and comply with federal securities laws and regulatory obligations. [Press Release](#).

## TIMELINE OF ACTIVITY RELATED TO THE FINANCIAL DATA TRANSPARENCY ACT OF 2022 (FDTA) [S.4295](#)

### JUNE 2023

- 30 The U. S. Securities and Exchange Commission (SEC) filed its first Semi-Annual Report to Congress Regarding Public and Internal Use of Machine-Readable Data for Corporate Disclosures required under the Financial Data Transparency Act (FDTA). [2023 FDIA Report](#).

### SEPTEMBER 2023

- 7 The SEC's Office of Structured Data released a draft 2024 update to SEC taxonomies for public review and comment. The 2024 draft updates all SEC-maintained eXtensible Business Reporting Language (XBRL) taxonomies for current and future acceptance in Electronic Data Gathering, Analysis, and Retrieval (EDGAR) system. Comments were due by November 10, 2023. [Draft 2024 Release Notes](#).

### NOVEMBER 2023

- 16 Date comments were due on the proposed improvements by the Financial Accounting Standards Board (FASB) for references in the 2024 U.S. Generally Accepted Accounting Principles (GAAP) Financial Reporting Taxonomy to include eXtensible Business Reporting Language (XBRL) specifications. [FASB Proposed Improvements](#).

### PROPOSED TIMELINE FOR FDIA

Summer 2024 – Proposed rules  
Winter 2024 – Standards under development  
Calendar Year 2026 – Rulemaking complete

- 7 The Municipal Securities Rulemaking Board (MSRB) received approval from the SEC to amend MSRB Rule G-12, on uniform practice, to promote the completion of allocations, confirmations, and affirmations by the end of trade date for municipal securities transactions between brokers, dealers and municipal securities dealers and their institutional customers. [MSRB Notice](#). **DL**

# SAVE THE DATE

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## CDIAC Webinars, Seminars, and Conferences

### FEBRUARY

FEBRUARY 28-29, 2024

In partnership with the California Municipal Treasurer's Association  
Fundamentals of Public Fund Investing  
Livermore, CA

For more information, visit the

[CDIAC event page](#)

### MARCH

MARCH 21, 2024

WEBINAR: Arbitrage Risks and Opportunities in the Current Market

[Registration and Event Page](#)

### MAY

MAY 22, 2024

Current Topics and Practices in Land-Secured and Development Finance  
Pomona, CA

For more information, visit the

[CDIAC event page](#)

### SEPTEMBER

Municipal Debt Essentials  
Additional details coming soon

## Other Webinars, Seminars, and Conferences

### FEBRUARY

FEBRUARY 28-MARCH 1, 2024

California Coalition for Adequate School Housing  
Annual Conference  
Sacramento, CA

For more information, visit the

[CASH event page](#)

### MARCH

MARCH 13-MARCH 15, 2024

Government Investment Officers Association  
Annual Conference  
Las Vegas, NV

For more information, visit the

[GIOA event page](#)

### APRIL

APRIL 4-APRIL 5, 2024

National Association of Bond Lawyers  
NABL U Presents The Institute 2024  
Chicago, IL

For more information, visit the

[NABL event page](#)

APRIL 7-APRIL 10, 2024

California Association of School Business Officials  
Annual Conference  
Palm Springs, CA

For more information, visit the

[CASBO event page](#)

APRIL 10-APRIL 12, 2024

National Association of Bond Lawyers  
NABL U Presents The Essentials 2024  
Atlanta, GA

For more information, visit the

[NABL event page](#)

APRIL 30-MAY 3, 2024

California Municipal Treasurers Association  
Annual Conference  
Costa Mesa, CA

For more information, visit the

[CMTA event page](#)

### MAY

MAY 19-23, 2024

National Association of State Treasurers  
Treasury Management Symposium  
Pittsburgh, PA

For more information, visit the

[NAST conference calendar](#)

### JUNE

JUNE 9-12, 2024

Government Finance Officers Association  
118<sup>th</sup> Annual Conference  
Orlando, FL

For more information, visit the

[GFOA event page](#)

JUNE 11-14, 2024

California Association of County Treasurers and Tax Collectors  
Annual Conference and Vendor Show  
Long Beach, CA

For more information, visit the

[CACTIC event page](#)

### JULY

JULY 31-AUGUST 2, 2024

California Association of Sanitation Agencies  
69<sup>th</sup> Annual Conference  
Monterey, CA

For more information, visit the

[CASA event page](#)



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## AUGUST

AUGUST 11-14, 2024

Association of Public Treasurers of  
the United States and Canada  
58<sup>th</sup> Annual Conference  
Greenville, SC

For more information, visit the

[APT US&C event page](#)

AUGUST 18-21, 2024

National Association of State Auditors,  
Comptrollers and Treasurers  
Annual Conference  
Charlotte, NC

For more information, visit the

[NASACT event page](#)

## SEPTEMBER

SEPTEMBER 9-12, 2024

California Special Districts Association  
Annual Conference & Exhibitor Showcase  
Indian Wells, CA

For more information, visit the

[CSDA event page](#)

SEPTEMBER 21-25, 2024

International City/County Management  
Association  
Annual Conference  
Pittsburgh, PA

For more information, visit the

[ICMA event page](#)

SEPTEMBER 22-25, 2024

National Association of State Treasurers  
Annual Conference  
Chicago, IL

For more information, visit the

[NAST conference calendar](#)

## OCTOBER

OCTOBER 1-4, 2024

California Association of County  
Treasurers and Tax Collectors  
Education Conference  
Burlingame, CA

For more information, visit the

[CACTIC event page](#)

OCTOBER 10-11, 2024

Coalition for Adequate School Housing  
Fall Conference  
Newport Beach, CA

For more information, visit the

[CASH event page](#)

OCTOBER 16-18, 2024

League of California Cities  
Annual Conference and Expo  
Long Beach, CA

For more information, visit the

[Cal Cities event page](#)

OCTOBER 23-25, 2024

The Bond Buyer 34<sup>th</sup> Annual California  
Public Finance Conference  
San Francisco, CA

Additional details coming soon

OCTOBER 25-27, 2024

Municipal Management Association  
of Northern California  
Annual Conference  
Olympic Valley, CA

For more information, visit the

[MMANC event page](#)

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Organizations may submit information on future educational seminars, meetings, or conferences by emailing [cdiac\\_education@treasurer.ca.gov](mailto:cdiac_education@treasurer.ca.gov). Publication of announcements is subject to space limitations.