

# Workshop Agenda

Tuesday, October 1, 2024



Wisconsin Health and Educational  
Facilities Authority

## Morning

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- 7:30 a.m. – 8:30 a.m.      **Registration & Continental Breakfast**
- 8:30 a.m. – 8:45 a.m.      **Welcome & Review of WHEFA Activities**  
Larry Wiemer, Executive Director; WHEFA
- 8:45 a.m. – 9:45 a.m.      **Economic and Market Landscape**  
George Cook, Managing Director; Graystone Consulting
- 9:45 a.m. – 10:30 a.m.      **Trends in Tax-Exempt Debt**  
Nathan Fronk, Partner; Quarles
- 10:30 a.m. – 10:45 a.m.      **Break / Networking**
- 10:45 a.m. – 11:45 a.m.      **Current Market Dynamics & Trends in Treasury Management**  
James Green, Senior Vice President; Kaufman Hall  
Marek Kowalewski, Senior Vice President; Kaufman Hall

## Noon

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- 11:45 a.m. – 12:30 p.m.      **Lunch**
- 12:30 p.m. – 1:00 p.m.      **Lunch Speaker – What Makes a Story a Story**  
Rich Kirchen, Senior Reporter; Milwaukee Business Journal

## Afternoon

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- 1:00 p.m. – 2:15 p.m.      **Strategies to Succeed in Today's Market**  
Michael Tierney, Managing Director; Fifth Third Securities
- 2:15 p.m. – 3:00 p.m.      **Alphabet Soup Anyone? What & Why You Need to Know About NZA's, SPO's and BCI's**  
Patrick Sandercock, Vice President, Moody's Ratings
- 3:00 p.m.      **Adjournment**