



Agenda

Tuesday February 6, 2018
Wyndham Irvine – Orange County Airport
17941 Von Karman Ave, Irvine, CA 92614

- 8:30 – 9:00 Check-In/Registration
- 9:00 – 9:10 Welcome/Introductions
- 9:10 – 9:30 Sub-Committee Business:
Review & Approval of Oct. 2017 Meeting Minutes – Anthony Helm, Placer County
Treasurer's Report – Jeff Emslie, Sacramento County
- 9:30 – 10:00 Updates:
Legislative – Carol Orth, Alameda County
Technology – Kim-Anh Le, Santa Clara County
- 10:00 – 10:30 CalSACA Website Overview – Marcia Salter, Nevada County
- 10:30 – 10:45 Break
- 10:45 – 12:00 Data Transformation: The need for data analysis and data extractions – Trevor Lysek,
Santa Barbara County & Keri Collins, Simpler Systems
- 12:00 – 1:00 Lunch
- 1:00 – 2:00 RDA Update – Chris Hill & Derk Symons, Department of Finance
- 2:00 – 3:00 Property Assessment and Taxes – Paula Cone, President, HDL
Trends, Impact of new income tax laws, Pending legislations
- 3:00 – 3:15 Break
- 3:15 – 3:45 Parcel Tax: Santa Clara County Civil Grand Jury – Kim Le, Santa Clara County
- 3:45 – 4:15 Open Discussion/Roundtable/Continuation of Topics/Other Updates
- 4:15 Adjourn



Agenda

Wednesday February 7, 2018
Wyndham Irvine – Orange County Airport
17941 Von Karman Ave, Irvine, CA 92614

- 8:00 – 8:30 Check-In/Registration
- 8:30 – 8:40 Welcome Back
- 8:40 – 9:10 Settling Accounts w/ the Auditor (GC27061 & RT2616) – Christy Redford, Napa County & Amanda Johnson, Lake County
- 9:10 – 10:00 General Obligation Bond Debt – Rate Computation – Jacelyn Ma, Santa Clara County
- 10:00 – 10:15 Break
- 10:15 – 11:00 Property Tax Audit Update – Scott Freesmeier, State Controller’s Office
- 11:00 – 12:00 Investment Strategies for a Successful Retirement – Daniel Catone, Golden State Wealth Management
- 12:00 – 1:00 Lunch
- 1:00 – 1:50 Parcel Taxes & Special Assessments – Tim Seufert, NBS
Special Financing District Formation
New Parcel Tax - Ballot for Voting and Subsequent requirements
Comments on any new or potential legislations
- 1:50 – 2:45 PACE : WRCOG –Andrea Roess & Donna Segura, David Taussig & Associates
PACE financial providers and programs [Residential and Commercial]
Comments on the County of Los Angeles’ PACE Awareness Campaign
FHA PACE Policy announcement of December 7, 2017
- 2:45 – 3:00 Break
- 3:00 – 3:30 Open Discussion/Roundtable/Topics for Next Meeting
- 3:30 Adjourn
- Next Meeting: Tuesday May 15th, 2018 in Sacramento