

Utah Money Management Council

350 N STATE STREET, SUITE 180
PO BOX 142315
SALT LAKE CITY, UTAH 84114-2315
TEL: (801) 538-1883
FAX: (801) 538-1465



A G E N D A

Interim Money Management Council meeting

April 15, 2024

Teleconference Via Google Meets

Anchor location: 350 North State Street, Suite 170

3:30 p.m.

A G E N D A

- 1.) THIS WILL BE A BRIEF MEETING TO APPROVE A NEW CERTIFIED INVESTMENT ADVISER.

Please Note: There will be a regular Money Management Council on June 20,2024 @3:00 p.m.

**Note: All Council members may be in attendance via Google meets
meet.google.com/aco-vbnq-brx

Join by phone

(US) +1 740-518-5462 PIN: 118 162 040#

The public is welcome to attend electronically.

K. Wayne Cushing, Chair
Salt Lake County
2001 South State Street N1-200
Salt Lake City, Utah 84114
Phone (385)-468-8305
kwcushing@slco.org

Corrie Forsling
Summit County
60 North Main Street
Coalville, Utah 84017
Phone (435)-336-3267
cforsling@summitcounty.org

Scott Burnett, Vice Chair
Zions Capital Advisors
One S Main, 12th Floor
Salt Lake City, UT 84133
Phone (801)-844-7740
scott.burnett@zionsbancorp.com

Mark W. Packard
Central Bank
75 N University Ave.
Provo UT 84601
801-655-2153
packardm@cbutah.com

Chip Dawson
South Jordan City
1600 W. Towne Center Drive
South Jordan, UT 84095
801-253-5203 ext. 1381
cdawson@sjc.utah.gov



UTAH DEPARTMENT OF COMMERCE

Division of Securities

SPENCER J. COX
Governor

DEIDRE M. HENDERSON
Lieutenant Governor

MARGARET W. BUSSE
Executive Director

JASON STERZER
Division Director

TO: Money Management Council
FROM: Michele Black, Division of Securities
RE: Additions to the Certified Investment Adviser List
DATE: April 15, 2024

The following agents and firms have been added to the existing list for conducting investment transactions with public treasures pursuant to rule 15 of the State Money Management Council.

Raymond James & Associates, Inc.

Investment Adviser Representatives:
Stan J. Goodell



UTAH DEPARTMENT OF COMMERCE

Division of Securities

SPENCER J. COX
Governor

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Executive Director

JASON STERZER
Division Director

DEIDRE M. HENDERSON
Lieutenant Governor

TO: Money Management Council
FROM: Michele Black, Division of Securities
RE: Current List Certified Investment Adviser
DATE: April 15, 2024

The following is the list of Certified Investment Advisers and Investment Adviser Representative(s) effective April 15, 2024:

AllianceBernstein L.P.

Investment Adviser

Representatives: Cameron Cole

1400 16th Street, Ste 450
Denver, CO 80202

Mary Conroy Grasso	"
Richard T. Gatherum	"
Bradley T. Gadomski	"
Herbert W. Moloney	"
Joshua Moreland	"
Edward C. O'Connor	"
Darreld R. Turner II	"
Jonathan Underkofler	"

Chandler Asset Management Inc.

Investment Adviser

Representatives: Jayson Schmitt

6225 Lusk Blvd.
San Diego, CA 92121

Meeder Public Funds, Inc.

Investment Adviser

Representative: Gregory Balls

10655 Park Run Dr. #120
Las Vegas, NV 89144
6125 Memorial Drive
Dublin, OH 43017
10655 Park Run Dr. #120
Las Vegas, NV 89144

John Jason Click

THERMODYNAMICS

Tonya L. Dazzio

Meeder Public Funds, Inc. cont.

Investment Adviser

Representative: Riley J. Littlefield

Richard L. Phillips
Benjamin Sehy

Nick Vaccari

10655 Park Run Dr. #120
Las Vegas, NV 89144

"
222 South Main St. 5th Fl.
Salt Lake City, UT 84101
6125 Memorial Drive
Dublin, OH 43017

Moreton Asset Management, LLC

Investment Adviser

Representatives: Jordan C. Hansen

Andrew J. Robbins
Daniel V. Rusk
Jason M. Williams

40 North 100 East
Farmington, UT 84025

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Peterson Wealth Services, Inc.

Investment Adviser

Representatives: Billy C. Peterson

Cade S. Peterson
Shaun R. Peterson
Margaret Pigg

1523 East Skyline Drive, Suite C
So. Ogden, UT 84405

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PFM Asset Management LLC

Investment Adviser

Representatives: Joan Evans

Lukas Schneider

Stefani VonHoltum-Niesent

1720 Carey Avenue, Suite 520
Cheyenne, WY 82001

1201 S. Alma School Road
Mail Code: LM-AZ-WADS
Mesa, AZ 85210
950 17th Street
Mail Code: DN-CO-T8
Denver, CO 80202

Raymond James & Associates, Inc.

Investment Adviser

Representatives:

Stan J. Goodell
2750 E. Cottonwood Okwy Ste 250
Cottonwood Heights, UT 84121-7289

Soltis Investment Advisors, LLC

Investment Adviser

Representatives: Kim D. Anderson

Cabe Atkinson

Tyler J. Finlinson

Christie N. Krompel

Brent D. Moore

Clark V. Taylor

William W. Wallace

Tyler K. Wilkinson

Shawn S. Woods

20 North Main Street, Suite 400

St. George, UT 84770

915 South 500 East, #110

American Fork, UT 84003

20 North Main Street, Suite 400

St. George, UT 84770

20 North Main Street, Suite 400

St. George, UT 84770

222 S. Main Street, Suite 1776

Salt Lake City, UT 84101

20 North Main Street, Suite 400

St. George, UT 84770

222 S. Main Street, Suite 1776

Salt Lake City, UT 84101

20 North Main Street, Suite 400

St. George, UT 84770

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Wells Fargo Clearing Services, LLC

Investment Adviser

Representatives: Christopher Ahearn

Daniel H. Payne

Timothy Payne

Christopher Soutas

201 S. Main Street, Suite 160

Salt Lake City, UT 84111

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2455 Parleys Way, Suite 250

Salt Lake City, UT 84109

Zions Capital Advisors, Inc.

Investment Adviser

Representatives: Blake Bihm

Scott R. Burnett

Peter Kelson

Bruce Snow

2125 W. Davis Street

Conroe, TX 77304

One South Main Street, 12th Floor

Salt Lake City, UT 84133

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