

Counties Perspectives Panel Discussion:

Bhumit Shah (panelist)

Deputy Director, Harris County

As the Deputy Director for Harris County, Bhumit Shah plays a significant role in overseeing the operational aspects of one of the largest counties in Texas. His responsibilities include managing key county functions, facilitating large-scale infrastructure and public works projects, and ensuring efficient public service delivery. Harris County, being a hub of economic activity, requires adept management of its resources, and Bhumit's role is crucial in maintaining fiscal discipline and driving organizational improvements. Shah's experience in public sector management and strategic planning enables him to optimize Harris County's operations and improve services for its millions of residents.

Melanie Bush (panelist)

Treasurer, Montgomery County

Melanie Bush is the Treasurer for Montgomery County, Texas, a role that entrusts her with the safekeeping and investment of public funds. In her position, Melanie manages the county's cash flow, investment portfolios, and ensures the efficient and legal distribution of public resources. Known for her strong fiscal discipline, Melanie has introduced various financial policies to streamline operations, cut costs, and increase the transparency of county finances. Her leadership also includes working with various county departments to oversee and approve budgets that support public safety, education, and infrastructure projects.

Christopher L. Breaux (panelist)

Fiscal Compliance Officer, Fort Bend County

As the Fiscal Compliance Officer for Fort Bend County, Christopher L. Breaux ensures that the county's financial practices adhere to state and federal regulations. His role includes overseeing audits, ensuring compliance with financial reporting standards, and mitigating financial risks. Christopher's work is critical for maintaining the fiscal integrity of the county, ensuring that public funds are managed responsibly and transparently. His background in financial management helps Fort Bend County remain compliant with regulations while maximizing the efficiency of its fiscal operations.

City of Houston “4 Credits” Perspectives Panel Discussion:

Samir Solanki (panelist)

Deputy Director, Houston Public Works

Samir Solanki serves as Deputy Director for Houston Public Works, one of the largest public works departments in the U.S. In his role, Samir is responsible for overseeing critical infrastructure projects, including water supply, wastewater management, road maintenance, and municipal utility systems. His expertise in public infrastructure management allows Houston to continuously improve its services and ensure that the city's infrastructure can meet the demands of its growing population. Samir's leadership has been instrumental in implementing sustainable practices and ensuring the efficient operation of Houston's essential public works systems.

Clint Stephen (panelist)

Chief Financial Officer, Houston Airport System

Clint Stephens is the Chief Financial Officer for the Houston Airport System, one of the busiest airport networks in the United States, which includes George Bush Intercontinental Airport, William P. Hobby Airport, and Ellington Airport. Clint oversees all financial aspects of the airport system, including budgeting, revenue management, and capital expenditures. His role involves managing financial strategies that ensure the airport system's growth while maintaining its financial health. With decades of experience in financial management, Clint ensures that the Houston Airport System remains competitive and well-equipped to handle increasing air traffic and large infrastructure projects.

Melissa Dubowski (panelist)

Finance Director, City of Houston

The Director's Office must provide security and integrity to the processes and performance of the City's financial operations. The division helps the City achieve objectives and long-term goals by overseeing, evaluating and improving the effectiveness of the divisions within the Finance department, as well as various citywide financial processes and business decisions. The Director serves as the executive head of the Finance department and must manage and oversee all policies, procedures and employees therein. The Director is responsible for monitoring and improving the financial functions of the City through sound fiscal planning, reporting and management.

Frank Wilson (panelist)

Chief Financial Officer, Houston First Corporation

Frank Wilson is the Chief Financial Officer for Houston First Corporation, an entity responsible for managing Houston's convention and performing arts facilities, including the George R. Brown Convention Center and the Wortham Theater Center. In his role, Frank manages the corporation's financial planning, including

budgeting, revenue forecasting, and managing long-term investments. Houston First plays a crucial role in driving the city's tourism and convention economy, and Frank's financial leadership ensures that the organization operates efficiently while contributing to the city's economic growth.

Texas Other Cities Perspectives Panel Discussion:

Jenny Kerzman (panelist)

Assistant Director of Treasury in the City Controller's Office for the City of Dallas

She is the Assistant Director of Treasury in the City Controller's Office for the City of Dallas. She joined the City in 2021 and is responsible for overseeing the areas of cash management and banking services, the administration of the City's \$4 billion investment portfolio, and the \$5 billion debt management program with over 30 years' experience.

She is a graduate of Texas Wesleyan University and a Certified Treasury Professional (CTP) since 1999. As a treasury professional of over 30 years, she is currently a member of several organizations, including the Government Finance Officers Association ("GFOA"), the Government Treasurers' Organization of Texas ("GTOT"), and is currently serving in the Advisory Board of Texas Connect. She has served as President and Treasurer of the Fort Worth Association for Financial Professionals (FWAFP). A long-time supporter of Texpo, a financial management conference sponsored by the Alliance of Texas Treasury Associations, she served as Chairman of the 2011 Texpo, Treasurer in 2021, and most recently as moderator for the Government Roundtable in 2023 and speaker for multiple sessions in 2024.

Kerzman is the newest member of the DFW Hispanic 100 organization and is currently serving in the Executive Board of the TX Women in Public Finance (WPF). She has served as President and Treasurer of the Fort Worth Association for Financial Professionals (FWAFP). A long-time supporter of Texpo, a financial management conference sponsored by the Alliance of Texas Treasury Associations, she served as Chairman of the 2011 Texpo, Treasurer in 2021, and most recently as moderator for the Government Roundtable in 2023 and speaker for multiple sessions in 2024.

Ethan Klos (panelist)

Treasurer City of Arlington

Ethan Klos is the Treasurer for the City of Arlington. He has been with the City since Aug 2009. As Treasurer, Ethan is responsible for the Cash management, Debt financing, and Investments of the City's portfolio. Other responsibilities include managing the banking relationships, credit card acceptance, capital budget, hotel occupancy tax program, and working closely with economic development. Prior to joining the City, Ethan had worked for a number of Fortune 500 companies in their Treasury departments beginning at Dell Computer in 1995. Ethan holds an MBA in Finance from Southwest Texas State University (now Texas State University – San Marcos) and a BS in Radio-TV-Film from the University of Texas, Austin.

Joe Zimmerman

Mayor of City of Sugarland

Mayor Joe Zimmerman has served as the 10th Mayor of Sugar Land, Texas, since June 2016, following a four-year term as an At-Large City Councilman. With a strong commitment to his community, Mayor Zimmerman serves on various key committees, including the Economic Development Committee, Intergovernmental Relations Committee, and the Sugar Land Development Corporation Board. He is also Sugar Land's representative on the Houston-Galveston Area Council (HGAC) Board and the Transportation Policy Council. Prior to his City Council role, he spent eight years on the Planning and Zoning Commission, including six years as Chairman. Professionally, Mayor Zimmerman is a Senior Consultant for Halff Associates, Inc., a civil engineering firm, bringing extensive business and management experience. He is also active in civic

organizations, having served on the boards of the Greater Fort Bend Economic Development Council and Fort Bend Chamber of Commerce. He holds a BS in Civil Engineering from the University of Houston and an MBA from Houston Baptist University.

Texas School Districts Perspectives Panel Discussion:

Stan Osborne

Chief Financial Officer, Aldine ISD

Stan Osborne serves as Chief Financial Officer of Aldine Independent School District, where he oversees the district's financial operations. His responsibilities include budget planning, financial reporting, and ensuring that the district's resources are allocated effectively to support educational programs and infrastructure.

Stan plays a critical role in ensuring that Aldine ISD remains financially stable while addressing the needs of its students and staff through careful fiscal management.

James Terry

Chief Financial Officer, Houston ISD

James Terry is the Chief Financial Officer of Houston ISD, the largest school district in Texas. In this role, he oversees the district's multi-billion-dollar budget, including the allocation of funds for educational programs, infrastructure, and operational costs. James is responsible for ensuring that the district maintains financial transparency and uses its resources to enhance student outcomes. His expertise in school finance is crucial for managing Houston ISD's complex financial operations and supporting its educational mission.

Ann Westbrook

Chief Financial Officer, Spring ISD

Ann Westbrook serves as CFO of Spring ISD, where she manages the financial planning, budgeting, and fiscal policies of the district. Her leadership helps ensure that Spring ISD uses its financial resources efficiently to support its educational goals. Ann's role also involves overseeing the financial aspects of capital improvement projects and ensuring that the district's fiscal practices comply with state and federal regulations.

Kristy Vienne

Vice Chancellor for Finance & Administration/CFO, Lone Star College

Kristy Vienne is the Vice Chancellor for Finance & Administration and Chief Financial Officer at Lone Star College, one of the largest community college systems in Texas. Kristy oversees the college's financial strategy, budgeting, and administrative operations, ensuring that resources are effectively allocated to support the college's academic and operational needs. Her leadership is key to maintaining Lone Star College's financial health while supporting its mission to provide accessible education to thousands of students.

Energy Transition Panel Discussion:

Ge'Juan Cole

Director of Projects, Williams Companies

As Director of Projects at Williams Companies, Ge'Juan Cole oversees major infrastructure and energy projects. Williams Companies is a leader in natural gas processing and transportation, and Ge'Juan's role is vital in managing multi-million-dollar projects that are essential to the company's growth and operations. His responsibilities include project planning, execution, and ensuring projects meet safety, environmental, and regulatory standards. Ge'Juan's leadership is critical in driving projects that expand Williams' pipeline infrastructure and ensure the reliable delivery of natural gas across the U.S.

Olamide Dada

Olamide Dada, CFA is the Director of Finance & Planning for Carbonvert. He has over ten years of experience in asset valuation, technical risk analysis and financial modeling. Dada started his career at BHP Billiton ("BHP") where he worked on different projects, including Asset Valuation, Reserve estimation and Reservoir modeling. Dada was a part of BHP's unconventional asset divestment team, involving the \$10 billion US Lower 48 asset sale to BP. Most recently, Dada worked for a private equity-backed natural gas company in a business development and project valuation capacity. Dada holds a BS in Geology from the University of Oklahoma and a Master of Science in Petroleum Geology from the University of Louisiana. He is a CFA charter holder and an active member of CFA society of Houston.

Jeff Alvarez

President and General Manager of 1PointFive Sequestration and TerraLithium

Jeff Alvarez is President and General Manager of 1PointFive Sequestration and TerraLithium, both wholly owned subsidiaries of Occidental. 1PointFive Sequestration is responsible for the development and operation of Oxy's carbon capture and sequestration business. TerraLithium is commercializing proprietary technology developed for an environmentally friendly method of ultra-pure lithium production by extracting lithium salts from subterranean brine and economically processing it into intermediate and battery grade products. Most recently, he served as Vice President of Investor Relations for Oxy where he led Oxy's engagement with the investor community and industry analysts. Prior to IR, he served as President and General Manager – Permian Resources, Texas Delaware Basin where he was responsible for the development and production of unconventional shale assets in the Permian Basin.

Jeff has more than 30 years of industry experience and has held management positions in numerous Oxy domestic business units, as well as internationally. Prior to joining Oxy in 2000, he worked for Altura Energy and Amoco where his roles were primarily in enhanced oil recovery (CO₂) asset leadership and subsurface engineering. Jeff holds a Bachelor of Science degree in Chemical Engineering from the Missouri University of Science and Technology (Rolla) and a Master of Business Administration from the University of Houston.

Pension Systems and How it Works Panel Discussion:

Trey Coleman

Chairman, Houston Police Pension System

Trey Coleman was elected to the Houston Police Officers' Board of Trustees in January of 2019. He has 18 years of service with the department and is currently assigned as the Commander at Vehicular Crimes Division. Trey has worked in multiple assignments across those 18 years that includes working patrol at Southwest Division, investigations at Investigative First Responder Division, the administrative sergeant at Special Victims Division, Internal Affairs Division, and helping establish HPD's North Belt Division. He has a journalism degree from Texas Tech University and is a proud Red Raider, and has also obtained a master's degree from Sam Houston State University. He also has a passion for athletics and has competed in the Texas Police Games for over a decade before being elected as a state director in January of 2019. Trey and his wife Cristina, along with their three boys, currently reside in Meyerland.

David Brand

Chairman, Atlanta Investment Pension Board

With over 25 years' experience in the public affairs industry, MSG Founding Partner David P. Brand has an established history aiding clients in the areas of strategic planning, business development, public affairs, and crisis management. Brand has spent years working within the issues of public policy and advocacy on the state, local, and federal levels, from city halls to Washington D.C. He founded MSG Public Affairs in 2001 to implement tailored, client-centric business and brand strategies that deliver meaningful results.

Jarvis V. Hollingsworth

Vice Chairman Irradiant Partners LP

Jarvis V. Hollingsworth is the Vice Chair at Irradiant Partners, LP, an alternative investment firm managing over \$12 billion in capital. He serves as an Independent Director at Vital Energy, Inc. and a member of the Financial Sector Advisory Council for the Federal Reserve Bank of Dallas, providing insight on financial industry risks. He has chaired the Board of Trustees for the Teacher Retirement System of Texas and held senior roles at Core Scientific, Kayne Anderson Capital Advisors, and Memorial Hermann Health System. A former Senior Partner at Bracewell LLP, Hollingsworth also served as a Captain in the U.S. Army and holds degrees from West Point and the University of Houston Law Center.

Moderators

Ron Green (Moderator for panel – **“City of Houston “4 Credits” Perspectives Panel Discussion”**)

Former Controller, City of Houston

Moderator/Credits

Ron Green is the former Controller for the City of Houston, serving from 2010 to 2016. As Controller, he was responsible for managing the city’s financial operations, including oversight of the city’s \$5 billion budget, auditing city departments, and providing financial reporting. Before his tenure as Controller, Ron served on the Houston City Council, representing District K, where he focused on improving public safety, enhancing city services, and fostering economic development. His leadership in fiscal management and public policy helped shape the city’s financial strategy during his time in office. Ron Green is also known for his work in law and finance, contributing to various civic initiatives in the Houston area.

Martha Salazar-Zamora (Moderator for panel – **“Texas School Districts Perspectives Panel Discussion”**)

Superintendent, Tomball ISD

Moderator/ISD Martha Salazar-Zamora

Martha Salazar-Zamora serves as the Superintendent of Tomball Independent School District (Tomball ISD), a growing suburban district located in the Greater Houston area. With over 30 years of experience in education, Martha has held various leadership roles in Texas school districts, including Assistant Superintendent and Chief Academic Officer. As Superintendent, she is responsible for overseeing the district’s academic programs, budget, and staff, ensuring that Tomball ISD meets the educational needs of its diverse student population. Under her leadership, Tomball ISD has experienced significant growth and earned recognition for academic excellence. Martha is deeply committed to student success, innovation in education, and preparing students for college and career readiness.

Telisa Toliver (Moderator for panel – ***“Energy Transition Panel Discussion”***)

Chevron

Moderator/Energy Transition

Telisa Toliver is the General Manager of Renewable Power at Chevron Pipeline and Power, where she leads the development and implementation of Chevron’s renewable power strategy globally. She oversees the integration of renewable energy projects with Chevron's operations and manages assets that include gas-fired and renewable power generation. With over 30 years in the energy industry, Toliver's career also includes significant roles in business development and strategy at Chevron. She is a board member at Atmos Energy and chairs the American Association of Blacks in Energy. Additionally, she is actively involved with the Executive Leadership Council, focusing on advancing diversity within corporate leadership.

Felix Chevalier (Moderator for panel – “**Pension Systems and How it Works Panel Discussion**”)

Attorney,

The Chevalier Law Firm, PLLC

Felix Chevalier is an attorney and government affairs professional with over 20 years of experience developing and implementing effective procurement and policy strategies. He’s skillful at identifying and facilitating public-private partnerships. Felix joined Cornerstone’s Houston office as a senior consultant in June 2022.

Felix provides expertise and client support at the local, state and federal levels. He also has an extensive national and international network, specifically in Central America, South America and the Caribbean. Felix has worked with companies in various industries including energy, manufacturing, transportation, agriculture, engineering, and technology. By leveraging his business, political, and legal experience, Felix has built a successful track record of working with clients to advance their strategic business objectives. He has strong relationships with the international diplomatic community and government officials. He has facilitated official delegations and international trade missions, representing companies, local governments and national associations.

Angel L. Jones (Moderator for panel – **(Moderator for panel – “Texas Other Cities Perspectives Panel Discussion”)**)

City Manager

Missouri City, Texas

Angel Jones is the 10th City Manager of Missouri City. Jones is the first woman in Missouri City history to be chosen City Manager. Jones most recently served as the City Manager of Portsmouth, Virginia. Prior to that, she spent eight years in the private sector as a Senior Consultant providing project and risk management expertise to federal agencies, including Health and Human Services and Housing and Urban Development.

Jones also served as the City Manager and City Manager Pro Tem in Gaithersburg, Maryland and Eugene, Oregon, respectively, becoming the first appointed female and African American to hold both positions. She is a retired Captain from the United States Army Reserves, where she served 10 years as a finance and equal opportunity officer.

Throughout her more than three decades of executive experience in all levels of government and the private sector, Jones has established a proven track record as an effective manager. She describes herself as a "can-do" passionate public servant, dedicated to enhancing organization results in a collaborative, transparent and inclusive manner.

In Portsmouth, Jones served as a catalyst for uniting a divided community around shared goals. Her economic development expertise includes creating incentives that dislodged stalled development projects in Gaithersburg, resulting in 4,500 new residential housing units and more than 1,000 jobs. Those incentives also led three corporations to relocate their headquarters to Gaithersburg, and helped retain Sodexo's North American Headquarters.

Derrick Mitchell (Moderator for panel – “**Counties Perspective on Public Finance**”)

Partner

Holland & Knights

Derrick Mitchell is an attorney in Holland & Knight's Houston office and leads the Tax-Advantaged Project Finance Team in Texas. Mr. Mitchell has nearly two decades of legal experience serving as bond counsel and disclosure counsel for tax-exempt financings for cities, counties, state agencies and independent school districts.

Mr. Mitchell represents national and regional investment banking firms as underwriter's counsel in bond and interest rate swap transactions. His practice emphasis includes general obligation and revenue bonds, including transportation revenue, industrial revenue, higher education, mortgage revenue, pollution control and nonprofit hospital bonds. He also serves as counsel to boards of independent school districts and community colleges.

Luncheon Keynote Speaker

Steve Kean

CEO, Greater Houston Partnership

Steve Kean serves as the CEO of the Greater Houston Partnership, an organization focused on promoting economic development and business growth in the Houston area. Previously, Steve was the CEO of Kinder Morgan, one of the largest energy infrastructure companies in North America. In his current role, Steve leads initiatives that foster collaboration between business leaders, policymakers, and community organizations to drive economic growth in the region. His leadership at the Greater Houston Partnership is focused on advancing the city's position as a global business hub.

Welcome Remarks

John Whitmire

Mayor, City of Houston

John Whitmire was elected Mayor of Houston in 2023 after a long and distinguished career in public service. He previously served as the longest-tenured member of the Texas State Senate, representing Senate District 15 since 1983. During his time in the Senate, Whitmire became a prominent advocate for criminal justice reform, public safety, and education, earning the nickname "Dean of the Texas Senate" for his leadership and institutional knowledge. As Mayor, Whitmire focuses on improving public safety, expanding affordable housing, and driving economic growth in Houston. His deep understanding of both state and local government allows him to address Houston's most pressing issues with a strategic and experienced approach.

Chris Hollins

Controller, City of Houston

Chris Holland serves as the Controller for the City of Houston, overseeing the city's financial operations, including accounting, financial reporting, and auditing. As Controller, Chris ensures the integrity of Houston's financial data and manages the city's \$5 billion-plus budget with transparency and accountability. His office is responsible for providing oversight on the financial performance of city departments and ensuring compliance with financial regulations. Chris's role is critical in maintaining the fiscal health of the city, ensuring taxpayer dollars are spent efficiently, and working closely with other city leaders to implement sound financial strategies.

Vernon M. Lewis

Treasurer, City of Houston

Vernon Lewis is the Treasurer for the City of Houston, tasked with overseeing the city's cash management, investments, debt program, and depository service. As Treasurer, Vernon is responsible for managing the city's portfolio and ensuring that public funds are managed in a manner that maximizes return while maintaining liquidity and safety. Mr. Lewis serve as the implementor and designer for the City of Houston ESG (Environment, Social, and Governance) Investment Initiative. Due to his many academic and career achievements, Mr. Lewis was honored The Bond Buyer Magazine Rising Star. He plays a vital role in advising the Controller on fiscal policy, helping Houston maintain its strong credit rating, and managing the city's debt obligations in a fiscally responsible manner.