PICWORKSHOP26 AGENDA

START	SESSION/DESCRIPTION	DURATION
	THURSDAY | NOVEMBER 19	
7:00 AM	**REGISTRATION/BREAKFAST (for in-person attendees)**	**60 min**
8:00 AM	Welcome and Opening Remarks *Alan Bond, BLX | Sandee Stallings, BLX*	5 min
8:05 AM	1. Post-Issuance Compliance: Introduction & Basics *Alan Bond, BLX | Ed Oswald, Orrick*	25 min
8:30 AM	2. PBU: Requirements & Exceptions *Richard Chirls, Orrick | Caleb Lansky, BLX | Aviva Roth, Orrick*	45 min
9:15 AM	3. PBU: Contracts & Agreements with Third Parties, Part I (Management & Service Contracts) *Jessica Doherty, BLX | Barbara Jane League, Orrick | Larry Sobel, Orrick*	45 min
10:00 AM	**BREAK**	**15 min**
10:15 AM	4. PBU: Contracts & Agreements with Third Parties, Part II (Sponsored Research) *Chas Cardall, Orrick | Caleb Lansky, BLX | Ed Oswald, Orrick*	45 min
11:00 AM	5. PBU in the Real World: Case Studies *Jessica Doherty, BLX | Caleb Lansky, BLX | Ed Oswald, Orrick | Aviva Roth, Orrick*	45 min
11:45 AM	**LUNCH BREAK**	**60 min**
12:45 PM	6. Continuing Disclosure & SEC & Municipal Market Considerations *Emily Brock, GFOA | Robyn Helmlinger, Orrick | Jeff Higgins, BLX | Dave Sanchez, SEC*	60 min
1:45 PM	7. Fintech Meets Public Finance: Innovations Shaping the Municipal Sector *Marc Bauer, Orrick | Josh Cain, BLX | Megan Kilgore, BKC | Nancy Kummer, BLX*	60 min
2:45 PM	**BREAK**	**15 min**
3:00 PM	8. Municipal Market Watch: Opportunities & Challenges *Imani Boggan, RBC | Jeff Higgins, BLX | Amy Kron, BLX | Tom Tight, PTMA*	45 min
3:45 PM	9. Hot Topics in Public Finance *Alan Bond, BLX | Joshua Bonney, Orrick | Chas Cardall, Orrick | Cathleen Chang, Orrick*	30 min
4:30 PM	**COCKTAIL RECEPTION (for in-person attendees)**	**120 min**
	FRIDAY | NOVEMBER 20	
7:15 AM	**BREAKFAST (for in-person attendees)**	**45 min**
8:00 AM	10. From the Field: Building a Successful PIC Program *Alan Bond, BLX | Kris Lindeman, Cedars | Maleia Torres, UNT*	45 min
8:45 AM	11. IRS: Staffing Is Down, But Audits Are Up *Cathleen Chang, Orrick | Barbara Jane League, Orrick*	30 min
9:15 AM	**BREAK**	**15 min**
9:30 AM	12. The Ups & Downs of Arbitrage: Rules & Regulations *Glenn Casterline, BLX | Justin Gagnon, BLX | Sandee Stallings, BLX*	60 min
10:30 AM	13. Rebate in the Real World: Case Studies *Richard Chirls, Orrick | Justin Gagnon, BLX | Sandee Stallings, BLX*	50 min
11:20 AM	**CLOSING REMARKS**	
11:30 AM	14. 2025 IRS Schedule K Review [501(c)(3) Organizations - Bonus Session] *Jessica Doherty, BLX | Amy Kron, BLX*	45 min

