



**Hope, Opportunity, Perseverance, & Empowerment (HOPE) for Children**

Office of State Treasurer Fiona Ma, CPA 901 P St, Suite 411B Sacramento, CA 95814

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**February 25, 2025**

**AGENDA ITEM # 4**

**ACTION ITEM**

**HOPE, OPPORTUNITY, PERSEVERANCE, AND EMPOWERMENT (HOPE)  
for Children Trust Account Program BOARD**

*Investment Recommendations from Investment Consultant-RVK, Inc.*

***Background***

RVK presented, and the Board discussed, investment policy during the Meeting in December, pertaining to:

- The overall investment structure
- Initial investment targets
- Intergenerational equity objectives and analysis
- Target dollar distributions per enrollee

***Recommendation:***

Staff recommends for the Board to adopt Resolution No. 2025-01 to approve investment recommendations from RVK, Inc. as discussed in the Board Meeting.

***Attachments***

Exhibit M – Investment Program Recommendations

Attachment #1 – Resolution 2025-01

***Presenter***

Sonia Ruiz and Janelle Booth, RVK



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