

10TH ANNUAL HOUSTON INVESTOR CONFERENCE

2026



Date:

MARCH 17

Time:

8:30 AM - 5:00 PM

Location:

HILTON AMERICAS

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LETTER FROM THE CONTROLLER

Dear Attendee,

Welcome to the 10th Annual City of Houston Investor Conference. We are honored to have you join us and grateful for your continued interest in Houston and the broader Texas region.

This year's conference marks an important milestone. For the past decade, the City of Houston Investor Conference has served as one of the few leading municipal investor conferences in the country—bringing together investors, public finance leaders, and policymakers for open and transparent conversations about the financial outlook of major issuers across Texas and the nation.

Houston continues to stand at the forefront of economic growth and opportunity. As the energy capital of the world and one of the most dynamic metropolitan regions in the United States, our economy is powered by a diverse mix of industries that also includes healthcare, logistics, aerospace, manufacturing, and technology. These sectors—combined with strong population growth and global connectivity—make Houston a compelling place for investment.

Warm Regards,



Chris Hollins

HOUSTON CITY CONTROLLER



Throughout today's conference, you will hear directly from leaders representing cities, counties, and school districts. These discussions will offer insights into fiscal management strategies, budget priorities, infrastructure investment, and the longterm financial outlook shaping communities throughout our state.

Transparency and engagement with the investor community remain central to responsible financial stewardship. Conferences like this strengthen relationships, promote understanding, and help ensure investors have the information needed to evaluate opportunities across Texas.

While you are here, I also encourage you to experience the culture, energy, and opportunity that define Houston. Our city's success is built on strong partnerships between the public and private sectors that continue to drive innovation and growth.

Thank you for joining us and for your continued partnership.



CONFERENCE AGENDA

Breakfast	8:00 AM - 9:00 AM LOCATION: REGISTRATION AREA
Opening Remarks	9:00 AM - 9:45 AM LOCATION: BALLROOM B
Panel 1A: Texas City & Counties Perspectives	10:00 AM - 11:00 AM LOCATION: BALLROOM A
Panel 1B: US City Perspectives	10:00 AM - 11:00 AM LOCATION: BALLROOM C
Lunch Keynote	11:10 AM - 12:00 PM LOCATION: BALLROOM B
Panel 2A: City of Houston Perspectives	12:05 PM - 1:00 PM LOCATION: BALLROOM B
Panel 2B: Energy Perspectives	12:05 PM - 1:00 PM LOCATION: BALLROOM A
Panel 3: Texas School Districts Perspectives	1:15 PM - 2:15 PM LOCATION: BALLROOM C
Closing Remarks Fireside Chat	2:30 PM - 3:30 PM LOCATION: BALLROOM B
Post-Conference Reception	4:00 PM - 7:00 PM LOCATION: BALLROOM A

OFFICE OF THE CONTROLLER



Chris Hollins

Houston City Controller

Chris Hollins is a native Houstonian who has served as Houston City Controller since January 2024. As the independently elected Chief Financial Officer of the nation's fourth-largest city, he provides oversight of a budget exceeding \$6 billion and manages the City's \$6 billion investment and \$14 billion debt portfolios. Controller Hollins prioritizes transparency, fiscal responsibility, and results-driven operations, using the office's auditing authority to implement best practices that improve service and reduce costs for residents.

Previously, Hollins served as Harris County Clerk, where he gained national recognition for protecting and expanding voting access for 2.5 million voters during the 2020 election. His leadership introduced innovations including drive-thru voting, 24-hour voting, online mail ballot tracking, and expanded early voting access, contributing to record voter turnout.

Hollins earned a Bachelor of Arts with Phi Beta Kappa honors from Morehouse College and completed a joint JD/MBA program through Yale Law School and Harvard Business School. He is admitted to the Texas State Bar and Southern District of Texas federal courts. He lives in Houston's Third Ward with his wife, Morgan, and their two children.

Vernon Middleton Lewis

Houston City Treasurer

Vernon Lewis serves as City Treasurer for the City of Houston, helping oversee the City's \$14 billion debt portfolio, \$6 billion investment portfolio, and depository banking system. A Houston native, he brings extensive expertise in public finance, debt management, and investment strategy, helping ensure long-term fiscal stability and accountability.

Lewis has emerged as a national leader in public finance, serving as the youngest member of the Board of Directors for the Association of Public Treasurers of the United States & Canada and on the board of Houston Christian University's Dunham College of Business. He is also the architect of Houston's Environmental, Social, and Governance (ESG) Investment Initiative.

He holds a graduate certificate in Financial Management from Cornell University and an MBA from Houston Christian University. Lewis also maintains multiple professional certifications in public fund investment and financial management. In recognition of his leadership, he was named a Rising Star by The Bond Buyer.



Will Jones

Deputy City Controller & Director of Financial Reporting

Will Jones is the Deputy City Controller and Director of Financial Reporting for the Houston City Controller's Office, where he oversees financial analysis and long-range forecasting. He previously served as Director of Finance under Mayor Sylvester Turner and has worked for the City of Houston since 2004. Before becoming Finance Director, Jones served as Deputy Director of the Financial Planning and Analysis Division, overseeing development of the City's \$5.7 billion annual operating budget. He also led long-range financial planning and oversight of city energy contracts, including electricity and natural gas procurement.

Jones has held leadership roles across multiple departments, including Finance, Information Technology, Administration and Regulatory Affairs, and the Houston Airport System, providing him with a comprehensive understanding of city operations. He holds a Bachelor of Business Administration from Sam Houston State University with concentrations in management information systems and finance.

HARRIS COUNTY COMMISSIONERS

Rodney Ellis

Commissioner, Precinct 1

Commissioner Rodney Ellis was born and raised in Houston's Sunnyside neighborhood and attended the Texas public school system from grade school through law school. Although he is an attorney, his passion is public service. On November 8, 2016, he was elected Harris County Commissioner for Precinct One, which serves approximately 1.1 million people. He previously represented a Houston district in the Texas Senate for more than 25 years and Houston's District D on the City Council for seven years. Ellis believes the role of government is to ensure that all people have the opportunity and ability to build a better future for themselves. As Harris County Commissioner, he is dedicated to providing quality and accessible services and programs that will enhance the lives of the people of Precinct One and fighting for reforms that will benefit all Harris County residents. Before joining the Texas Senate in 1990, Ellis served three terms on the Houston City Council and as chief of staff to the late U.S. Congressman Mickey Leland. He holds a bachelor's degree from Texas Southern University, a master's degree from the Lyndon B. Johnson School of Public Affairs, and a law degree from the University of Texas School of Law. Rodney Ellis is married to Licia Green-Ellis and has four children.



Adrian Garcia

Commissioner, Precinct 2

Commissioner Adrian Garcia has always called Precinct 2 home. Born and raised in Houston's Near Northside neighborhood, Garcia joined the Houston Police Department upon graduating high school. After a distinguished career as police officer across two decades, he was elected to Houston City Council District H and named Mayor Pro Tem under Mayor Bill White. In 2008, Garcia became the first Latino Sheriff of Harris County. As Sheriff, he instituted the first Special Weapons and Tactics (SWAT) Team and saved the county more than \$200 million while increasing the number of patrol deputies and reducing jail overcrowding. In 2018, Garcia was elected as the Commissioner for Precinct 2, the northern and eastern portions of Harris County that spans from Aldine to League City. Now in his second term, Garcia focuses his Revive2Thrive initiative to revitalize the precinct through strategic investments in infrastructure, public safety, and economic opportunity. His mission is to make Precinct 2 the best place to live, work, and play for all. One of his proudest Revive2Thrive accomplishments is the overhaul of James Driver Inclusive Park, an award-winning greenspace designed for families of all abilities and ages and remains the county's only fully inclusive park.



Panel 1A: Texas City & Counties Perspectives

10:00 AM – 11:00 AM
LOCATION: BALLROOM A



Derrick Mitchell

Partner, Holland & Knight

Derrick Mitchell is a partner in Holland & Knight's Houston office and leads the firm's Texas Tax-Advantaged Project Finance Team. With nearly two decades of experience, he serves as bond and disclosure counsel for tax-exempt financings supporting cities, counties, state agencies, and school districts. His practice spans general obligation and revenue bonds across transportation, education, healthcare, and nonprofit sectors.

Jenny Kerzman

Assistant Director of Treasury, City of Dallas

Jenny Kerzman serves as Assistant Director of Treasury for the City of Dallas, overseeing cash management, a \$4.5 billion investment portfolio, and a \$6.6 billion debt program. With more than 30 years of public finance experience, she previously held leadership roles in Arlington and Fort Worth. Kerzman serves on multiple boards, including Texas Women in Public Finance, and was named a 2024 Women in Public Finance Issuer Ambassador.



Fahad Gulzar

Deputy Executive Director, Harris County

Fahad Gulzar serves as Acting Deputy Executive Director for Harris County Office of Management and Budget, overseeing treasury operations, debt management, and investment strategy for one of the nation's largest counties. He manages a \$6.4 billion debt portfolio and an \$8 billion investment portfolio supporting Harris County and its related entities, with a focus on liquidity, capital markets, and long-term fiscal sustainability. With more than a decade of experience in county, municipal government, and consulting, he brings a strategic approach to public finance and credit management.

Panel 1B: U.S. City Perspectives

10:00 AM – 11:00 AM
LOCATION: BALLROOM C



Guy T. Logan

Managing Director, Oppenheimer

Guy T. Logan is Managing Director and Head of Infrastructure & the Mid-Atlantic Region in Oppenheimer's Public Finance Investment Banking Division, reporting to Beth Coolidge. With more than 30 years of municipal finance experience, he has led over 250 transactions totaling more than \$55 billion across a diverse range of public sector clients.

His appointment reflects Oppenheimer's continued investment in expanding its Public Finance platform under Coolidge's leadership.

Mohamed Balla

Chief Financial Officer, City of Atlanta

Mohamed Balla has served as Chief Financial Officer for the City of Atlanta since 2021, overseeing multi-billion-dollar budgets and financial operations. Under his leadership, the city achieved a Triple-A credit rating while expanding investments in public safety and infrastructure. He previously held leadership roles in Atlanta's Department of Watershed Management and served as the City's Cash and Investment Manager.



Mary Beth Thompson

Chief Financial Officer, Salt Lake City

Mary Beth Thompson has served as Chief Financial Officer for Salt Lake City since 2016, overseeing financial strategy for a budget exceeding \$1.8 billion. She leads multiple divisions, including Budget, Treasury, Procurement, and Internal Audit, with a focus on transparency and fiscal sustainability. Thompson brings experience from both government and private-sector financial leadership.



Lunch Keynote

11:10 AM - 12:00 PM
LOCATION: BALLROOM B



KEYNOTE SPEAKER

Bryan Daniel

President, NYSE Texas

Bryan Daniel is President of NYSE Texas, part of the New York Stock Exchange Group. He previously served as Chairman of the Texas Workforce Commission and held leadership roles in economic development and tourism for the State of Texas. Daniel also served as Texas State Director for Rural Development and Chief Administrator for Trade and Business Development at the Texas Department of Agriculture.

Closing Remarks Keynote

2:30 PM - 3:30 PM
LOCATION: BALLROOM B

John Coppins

Vice President, Operations, FIFA World Cup 26 Host City Committee

John joined the Harris County - Houston Sports Authority in September 2023, bringing more than a decade of experience in major event management and sports administration. Prior to his arrival, Coppins spent 12 years with the United States Golf Association (USGA), where he served as director for both the U.S. Open and U.S. Women's Open, overseeing large-scale championship operations across areas including event logistics, stakeholder & volunteer management, sponsorships, ticketing, and athlete affairs. Since January 2025, John has focused full-time on FWC26 Houston planning efforts centered around stadium modifications & operations, safety & security, transportation, brand protection, training sites, team base camps, sustainability initiatives and volunteer program management.



KEYNOTE SPEAKER

Panel 2A: City of Houston Perspectives

12:05 PM - 1:00 PM
LOCATION: BALLROOM B



MODERATOR

Chris Brown

Former City Controller, City of Houston

Chris Brown served as Houston City Controller from 2016 to 2024, following his tenure as Chief Deputy City Controller. His career spans public service and the private sector, including work as a securities trader and equity trading firm co-founder. He has held national leadership roles with the National League of Cities and served on numerous civic boards.

Melissa Dubowski

Finance Director, City of Houston

Melissa Dubowski serves as Finance Director for the City of Houston, overseeing financial operations related to public infrastructure bond programs. She specializes in debt management, financial planning, and municipal compliance. Her work ensures fiscally responsible delivery of major capital projects.



Frank Wilson

Chief Financial Officer, Houston First Corporation

Frank Wilson is Chief Financial Officer for Houston First Corporation, which manages the city's convention and performing arts venues. He oversees financial planning, budgeting, and investment strategy supporting Houston's tourism and convention economy. His leadership ensures efficient and sustainable operations across major civic assets.

Clint Stephen

Chief Financial Officer, Houston Airport System

Clint Stephen is Chief Financial Officer for the Houston Airport System, overseeing financial strategy for one of the nation's busiest airport networks. His responsibilities include budgeting, revenue management, and capital planning for major infrastructure growth. He brings decades of financial leadership experience in large-scale public operations.

Samir Solanki





Samir Solanki

Deputy Director, Houston Public Works

Samir Solanki serves as Deputy Director for Houston Public Works, overseeing water, wastewater, roadway maintenance, and municipal utilities. His leadership emphasizes service reliability, sustainability, and infrastructure resilience. He plays a key role in supporting Houston's long-term growth and infrastructure needs.

Panel 2B: Energy Perspectives

1:15 PM – 2:15 PM

LOCATION: BALLROOM A



MODERATOR

Jane Stricker

Executive Director, HETI, Greater Houston Partnership

Jane serves as Executive Director of HETI, where she leads the Greater Houston Partnership's initiative to leverage Houston's energy leadership to advance global low-carbon solutions. She works with industry, academic, and community partners to strengthen the region's economic competitiveness while accelerating progress toward a net-zero future. Before joining the Partnership, Jane spent more than 20 years at bp, most recently partnering with cities and industry on low-carbon energy solutions and supporting the implementation of the Houston Climate Action Plan.

Takajiro Ishikawa

President & CEO, Mitsubishi Heavy Industries America

Takajiro Ishikawa serves as President and CEO of Mitsubishi Heavy Industries America, leading North American operations focused on carbon neutrality and infrastructure innovation. With more than 30 years of industry experience, he specializes in industrial operations and investment in emerging technologies. He is committed to advancing MHI's goal of net-zero emissions by 2040.



Taylor Chapman

Investment Principal, New Climate Venture

Taylor Chapman is an investor at New Climate Ventures, supporting early-stage companies focused on decarbonization and energy transition technologies. His background includes venture capital, M&A, and leadership roles at McKinsey & Company and venture-backed startups. He is deeply involved in Houston civic and environmental initiatives, with a passion for preserving the city's bayou systems.



Caitlin Smith

Vice President, Policy & Corporate Communications, Jupiter Power

Caitlin Smith is Vice President of Policy and Corporate Communications for Jupiter Power, leading regulatory strategy for utility-scale energy storage across North America. She has deep expertise in ERCOT market design and previously served as the first in-house counsel for ERCOT's Independent Market Monitor. Smith founded the Texas Energy Storage Coalition and champions women's leadership in energy policy.



Panel 3: Texas School Districts Perspectives

1:15 PM – 2:15 PM
LOCATION: BALLROOM C



James Terry, Ph. D.

Chief Financial Officer, Houston Independent School District
James Terry, Ph.D., serves as Chief Finance and Operations Officer for Houston ISD, aligning financial strategy with academic priorities. He is recognized for his commitment to transparency, accountability, and effective resource management. His leadership supports operational improvements that strengthen learning environments districtwide.

Eduardo Ramos

Deputy Superintendent of Business Services, Dallas Independent School District
Eduardo Ramos serves as Chief Financial Officer for Dallas ISD, overseeing a \$1.9 billion budget. Previously, he was CFO for Austin ISD, where he helped lead the successful passage of a historic \$2.4 billion bond program in 2022. He brings extensive experience in school finance and long-term capital planning.



Katrina Montgomery

Chief Financial Officer, Austin Independent School District
Katrina Montgomery serves as Assistant Superintendent of Finance for Austin ISD and brings more than 30 years of accounting and finance experience. She is known for building high-performing teams and advancing opportunities for students in underserved communities. Montgomery was recognized with the 2024–25 Austin ISD Darlene Westbrook Leadership Award and serves as an Issuer Ambassador for Women in Public Finance.

Karen Smith

Chief Financial Officer, Cypress-Fairbanks Independent School District
Karen Smith is the Chief Financial Officer at Cypress-Fairbanks ISD, the 3rd largest district in Texas, with over 115,000 students and a budget of \$1.2 billion. She has worked in school business for 33 years with experience in finance, risk management, child nutrition, technology, bond planning and internal audit. Karen is an active member of the Texas ASBO affiliate and ASBO International. She has served on ASBO's Legislative Advisory Committee and is a current ASBO board member.





THANK YOU



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