



Michigan School Business Officials

MSBO School Finance Services Committee Up North Workshop Agenda

Lakeside Resort and Conference Center Houghton Lake, MI

100 Clearview Dr., Houghton Lake, MI 48629

Thursday, October 9, 2025

- 6:00 pm **Reception** – Roscommon Room
Sponsored by
 - *American Fidelity*
 - *Kingscott Associates, Inc.*
 - *Stifel, Nicolaus & Company, Inc.*
 - *Plante Moran*
- 7:00 pm **Dinner** – Roscommon Room
- 8:00 pm **Hospitality** – Roscommon Room
 - *Sponsored by Corebridge Financial*

Friday, October 10, 2025

Officers: **Mark Mesbergen**, Chairperson, Fruitport Community Schools
Anna Wamack, Vice Chair, Secretary, Midland Public Schools
Devin Kling, Secretary, Northville Public Schools
Rachelle Roby, Officer Elect, Coldwater Community Schools
Michael Klosowski, Past-Chairperson, Elkton-Pigeon-Bay Port Laker Schools

- 7:30 am **Breakfast Buffet** – Roscommon Room
 - *Sponsored by MILAF+/PFM Asset Management and PFM Financial Advisors, LLC*
- 8:00 am **Welcome and Call to Order** — *Mark Mesbergen, Chairperson*
Introduce the FY2025-26 Slate of Officers (*previously approved in June 2025*)
- 8:10 am **Legislative Update** — *David Ladd, Kelley Cawthorne*
- 9:00 am **ORS Update** — *Patrick Guysky, Emma Mann and Angela Sanborn, DTMB-ORS*
- 9:30 am **MSBO Update** — *Robert K. Dwan and Jason R. Helsen, MSBO*
- 9:45 am **Break**
- 10:00 am **Strategic Investing and District Debt Planning** — *Sean Wahl, PFM Financial Advisors and Jeffrey A. Zylstra, Stifel Nicolaus*
- 10:30 am **State and Federal Budget and Grants Update** — *Kevin Walters, MDE*
- 11:15 am **Accounting and Auditing Update*** — *Eric V. Formberg, Plante Moran (retired partner)*
- 12:00 pm **Roundtable, Wrap-Up, and Review** — *Mark Mesbergen, Chairperson*
FY2025-26 MSBO School Finance Committee Calendar and Topics
- 12:15 pm **Adjourn**

Next Meeting: Nov. 21, 2025, 9:30 AM - Zoom