

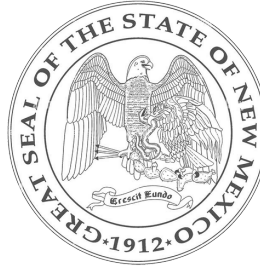
The Education Trust Board of New Mexico | AGENDA, May 13, 2026

THE HONORABLE MICHELLE LUJAN GRISHAM

Governor of New Mexico

STEPHANIE RODRIGUEZ

Cabinet Secretary, New Mexico Higher Education Department



BOARD MEMBERS

GARY L. GORDON, CHAIR
 MONT GREEN
 LAWTON DAVIS
 CHAMIZA PACHECO DE ALAS
 VALERIE VALLES-PEDROZA

EXECUTIVE DIRECTOR

NATALIE CORDOVA

Date/Time: 5/13/2026, 9:00 AM

Location: 33 Plaza La Prensa, Santa Fe, NM 87507

Agenda

9:00 – 9:05	<ol style="list-style-type: none"> 1. CALL TO ORDER 2. APPROVAL OF AGENDA - discussion and possible action 3. APPROVAL OF MINUTES – 2/4/26 discussion and possible action 4. PUBLIC COMMENT
9:05 – 9:40	<ol style="list-style-type: none"> 5. EXECUTIVE DIRECTOR’S REPORT - Natalie Cordova, Executive Director <ol style="list-style-type: none"> a. FY 2026 Q3 Financial Report - Janet Pacheco-Morton, Morton Accounting Services - discussion and possible action b. Investment Monitoring Timeline - information c. Legal Services RFP – discussion and possible action d. FY 2027 Budget Update and Review – discussion and possible action e. FY 2027 Small Contract Update and Contract Approvals – discussion and possible action
9:40 – 10:05	<ol style="list-style-type: none"> 6. Artificial Intelligence Education – Jordan Wilcox, Responsible AI Governance and Risk Leader Legal Corporate – information only
10:05 – 10:50	<ol style="list-style-type: none"> 7. a. PROGRAM MANAGER’S QUARTERLY OPERATIONS AND INVESTMENT REPORTS Khalel Pritchard and Tom Lowe, Ascensus - Scott Smith, James Fennessey, Chad Severin: Principal – discussion and possible action <ol style="list-style-type: none"> b. Blue Chip Stand Alone Fund Review–Scott Smith, James Fennessey and Chad Severin, Principal and Kay Ceserani, Meketa - discussion and possible action c. NYLI MacKay High Yield Corporate Bond Fund Review: Scott Smith, James Fennessey and Chad Severin, Principal and Kay Ceserani, Meketa: discussion & possible action
10:50 – 11:10	<ol style="list-style-type: none"> 8. a. INVESTMENT CONSULTANT’S QUARTERLY REPORT AND WATCH LIST RECOMMENDATIONS - Kay Ceserani, Meketa Consulting - discussion and possible action <ol style="list-style-type: none"> b. FEE REVIEW - Kay Ceserani, Meketa Consulting - information
11:10 – 11:30	<ol style="list-style-type: none"> 9. SCHOLAR’S EDGE MARKETING, SALES AND DISTRIBUTUION REPORT AND FY 27 MARKETING BUDGET AND MARKETING PLAN OVERVIEW - Jori Horn and Brandon Miller, Principal - discussion and possible action
11:30 -12:00	<ol style="list-style-type: none"> 10. THE EDUCATION PLAN QUARTERLY MARKETING REPORT – Jeff Turcotte, ETB, Dezaree Vega-Garcia and Jerry Matthews, Sunny 505 – Del Esparza and Lindsey Lubenow, Esparza - discussion and possible action
12:00	<ol style="list-style-type: none"> 11. ADJOURNMENT

If you are an individual with a disability and need a reader, amplifier, sign language interpreter, or other auxiliary aid to attend or participate in the hearing or meeting, please contact the New Mexico Education Trust Board at (505) 476-3860 at least one week in advance or as soon as possible. Public documents, including agendas and minutes, are available in accessible formats upon request.