

\$100,000,000*
Ohio Water Development Authority
Drinking Water Assistance Fund Revenue Bonds
Series 2021A



INVESTOR PRESENTATION
February 24, 2021



Disclaimer



The purpose of this electronic Investor Presentation (“Presentation”) is to provide potential investors and others with information about the proposed offering of securities described herein; however, this Presentation is not part of the “preliminary official statement” or the “final official statement” as those terms are defined in SEC rule 15c2-12. This Presentation is qualified in all respects by reference to the Preliminary Official Statement, and prospective purchasers of the Drinking Water Assistance Fund Revenue Bonds, Series 2021A (the “Bonds”) should rely only on the Preliminary Official Statement, and not this Presentation, in making an investment decision. The materials and statements contained in this Presentation do not constitute an offer to sell or a solicitation of any offer to buy any securities of Ohio Water Development Authority (the “Authority”) to any person in any jurisdiction, nor shall there be any sale of securities in any jurisdiction in which such offer, solicitation or sale would be unlawful prior to registration or qualification under the securities laws of such jurisdiction. Unless indicated otherwise herein, the information in this Presentation represents a summary of certain information in, has been sourced from, and is available in, the Preliminary Official Statement. To the extent there are conflicts between statements made in the Preliminary Official Statement and this Presentation, the information contained in the Preliminary Official Statement should be deemed more reliable.

If you have been invited to view this Presentation, you should already have been provided with a copy of the Preliminary Official Statement, dated 02/24/2021, relating to the Bonds. If you have not yet received a copy of the Preliminary Official Statement, electronic copies of the Preliminary Official Statement may be obtained at: www.munios.com. Investors should read the entire Preliminary Official Statement carefully before making an investment decision. Any investment decisions regarding the Bonds should only be made after careful review of the complete Preliminary Official Statement.

An investment in the Bonds involves certain investment risks. The business of the Authority is subject to a number of risks and uncertainties, certain of which are beyond its control. Such risks may cause actual operating results or financial performance to be materially different from expectations, which could affect payments to be made with respect to the Bonds.

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Transaction Summary*



Drinking Water Assistance Fund Revenue Bonds, Series 2021A

Issuer:	Ohio Water Development Authority (the “Authority” or “OWDA”)
Par Amount:	\$100,000,000
Ratings:	Applied For Moody’s and S&P
Tax Status:	Tax-Exempt (Federal and State of Ohio)
Use of Funds:	Proceeds from the sale of the Series 2021A Drinking Water Assistance Fund (“DWF”) Bonds are to be issued to (a) raise moneys for the sole benefit of the Drinking Water Assistance Fund as provided in division (U) of Section 6121.04 of the Ohio Revised Code, the DWF General Bond Resolution and the Series 2021A DWF Bond Resolution, or to reimburse the Authority for funds advanced for that purpose, and (b) pay issuance expenses relating to the issuance of the Series 2021A DWF Bonds
Security:	Principal of and interest on the Series 2021A DWF Bonds are payable solely from, and are secured on a subordinate basis to the previously issued Leverage Bonds that the Authority has issued or may issue in the future to refund previously issued and outstanding Leverage Bonds, by a pledge and assignment of Pledged Revenues, consisting primarily of the principal and interest payments by Governmental Agencies pursuant to the DWF Loan Agreements entered into pursuant to the Program, and by certain funds created by the Trust Agreement
Bond Structure:	Fixed rate bonds with a serial semiannual principal amortization from June 1, 2030 to December 1, 2034 and term bonds due each December 1 from 2035 to 2039
Optional Redemption ⁽¹⁾ :	The Series 2021A DWF Bonds maturing on or after December 1, 2031 are subject to prior redemption by and at the sole option of the Authority in whole multiples of \$5,000, either in whole or in part (as selected by the Authority) on any date on or after June 1, 2031, at a redemption price equal to 100% of the principal amount redeemed, plus accrued interest to the redemption date.
Interest:	Semiannually on June 1 and December 1, beginning on June 1, 2021
Pricing Date:	March 10, 2021
Closing Date:	March 24, 2021
Underwriters:	Huntington Capital Markets (Senior Manager) UBS (Co-Senior Manager); Loop Capital Markets; RBC Capital Markets (Co-Managers)

(1) Additional redemption provisions exist; see the “THE SERIES 2021A DWF BONDS – Redemption Provisions” section in the Preliminary Official Statement for details

**Preliminary, subject to change.;*

Overview of OWDA



The Ohio Water Development Authority

- Created in 1968, the Authority has provided water and wastewater loans to communities throughout Ohio for over 50 years
- The Authority consists of eight members
 - Five members of the Authority are appointed by the Governor for eight-year, staggered terms, with the advice and consent of the State Senate
 - The Director of Natural Resources, the Director of Environmental Protection and the Director of the Development Services Agency of the State are members ex officio of the Authority
- Jointly administers (with Ohio EPA) the federally authorized bond funded Wastewater and Drinking Water revolving loan programs; and also funds its own bond funded revolving fund loan program (Fresh Water) and provides conduit financing for private businesses
- Established and administers non-bond funded programs that include: Solid Waste Program (established in 1991); R&D Grant Program (1991); Brownfield Program (1994); Local Economic Development Program (1995); Village Capital Improvement Fund Program (1996); Emergency Relief program (1997); Dam Safety Linked Deposit program (1999); County Coastal Erosion Loan Program (1999); Unsewered Area Planning Loan Program (2009); Alternative Stormwater Infrastructure Loan program (2010); Unsewered Area Assistance Program (2013); and Loan Advance Program (2015)



Drinking Water Assistance Fund Program Overview



- OWDA’s Drinking Water Assistance Fund Program is the State Revolving Fund program that funds qualified drinking water projects in the State of Ohio
- It is authorized at the federal level by the Safe Drinking Water Act that directs the U.S. EPA to create drinking water state revolving fund (“DWSRF”) programs to assist public water systems to finance the cost of infrastructure to achieve or maintain compliance with the Safe Drinking Water Act requirements and to protect public health
- In order to receive a federal capitalization grant, a state must provide a “state match” totaling 20% of the total federal grant and OWDA currently funds its State Match utilizing several approved funding mechanisms
- OWDA utilizes Capitalization Grants and State Match monies – combined with bond proceeds and excess loan repayments -- to make loans to borrowers in the DWAF
- Since 1998, the DWAF has received \$646.8 million of federal capitalization grants which have been matched with \$129.4 million of State matching funds. The adjacent table shows this funding over the last five years
- As of December 31, 2020, OWDA has made over \$1.9 billion in DWAF loans since the program’s inception



Capitalization Grants		
Federal Fiscal Years 2016-2020		
Year	Capitalization Grant	State Match
2016	23,107,000	4,621,400
2017	22,909,000	4,581,800
2018	27,935,000	5,587,000
2019	27,674,000	5,534,800
2020	27,692,000	5,538,400
Total	\$129,317,000	\$25,863,400

DWAF Program Loan Terms & Interest Rates



- The DWAF Program's subsidized loan rates provide below market funding creating a strong incentive for participation by communities throughout Ohio
- The DWAF Program loan rates are reset monthly based upon the following methodology:

Loan Rate	Rate Setting
Standard Intermediate-Term Rate (5 – 20 years)	8-week average of the MMD 20 Year AA GO rate less 0.95%
Standard Long-Term Rate (21 – 30 years)	8-week average of the MMD 30 Year AA GO rate less 1.00%
Small Communities	Standard rate less 0.50%; Floor of 0%
Hardship	0% to 1.0% depending on community service population

- DWAF Construction Loans are not callable by the borrowers and may not be prepaid by the borrower prior to maturity

DWAF Loans Financed and Significant Government Agency Participants



As of December 31, 2020

- Currently, the DWAF portfolio includes 233 Governmental Agencies with 598 Projects financed through loans made by the Authority (the “Existing DWAF Loans”) pursuant to loan agreements with the Authority
- A total of \$1.634 billion of Existing DWAF Loans have been made, with a par of \$1.196 billion outstanding

Top 10 Local Government Agencies by Percent of Projected Total Remaining Principal Repayments

Local Governmental Agency	Number of Projects	Estimated Project Costs Funded with DWAF Loans	Projected Remaining Leverage and DWAF Revenue Series Repayments	Percent of Projected Total Remaining Loan Repayments
Columbus	46	\$316,608,732	\$301,920,758	25.24%
Toledo	4	100,829,954	92,724,337	7.75
Akron	18	81,792,446	79,782,768	6.67
Cleveland	11	152,766,777	63,127,269	5.28
Cincinnati	49	80,984,119	62,933,937	5.26
Avon Lake	3	35,914,143	31,636,503	2.64
Miamisburg	5	30,834,795	28,090,166	2.35
Bucyrus	1	28,579,281	24,840,903	2.08
Mahoning Valley Sanitary District	9	35,399,506	23,400,930	1.96
Oregon	7	36,837,875	22,568,835	1.89
Total	153	\$900,547,628	\$731,026,406	61.10%



Enforcement Process for Revenue Collection

- The Authority has covenanted to its bondholders that it will take all necessary actions to collect all loan payments due to the Authority, including:
 - Sending invoices 15 days prior to due date
 - Making demand for payment within 20 days after any default
 - Giving notice that if the default is not remedied within 2 months the Authority will file suit to collect the moneys due
 - Filing suit within 3 months of the default date
- The Authority has a strong, 50-year record of enforcing its rights to loan payments
 - Currently, there is no active litigation to collect DWAF loan payments
 - Two governmental agencies that are borrowing under DWAF Loans are currently subject to State financial supervision under the fiscal emergency act; the City of Fostoria and the Village of Bridgeport are current on DWAF Loan payments

DWAF Loans Under Fiscal Emergency Act		
Governmental Agency	Outstanding DWAF Loan Amount	Final Payment Date
Village of Bridgeport	\$693,559	1/1/2045
City of Fostoria	496,428	1/1/2031
Total	\$1,189,987	

- Loan repayment dates are generally set five months prior to bond debt service payment dates to provide cushion for collections

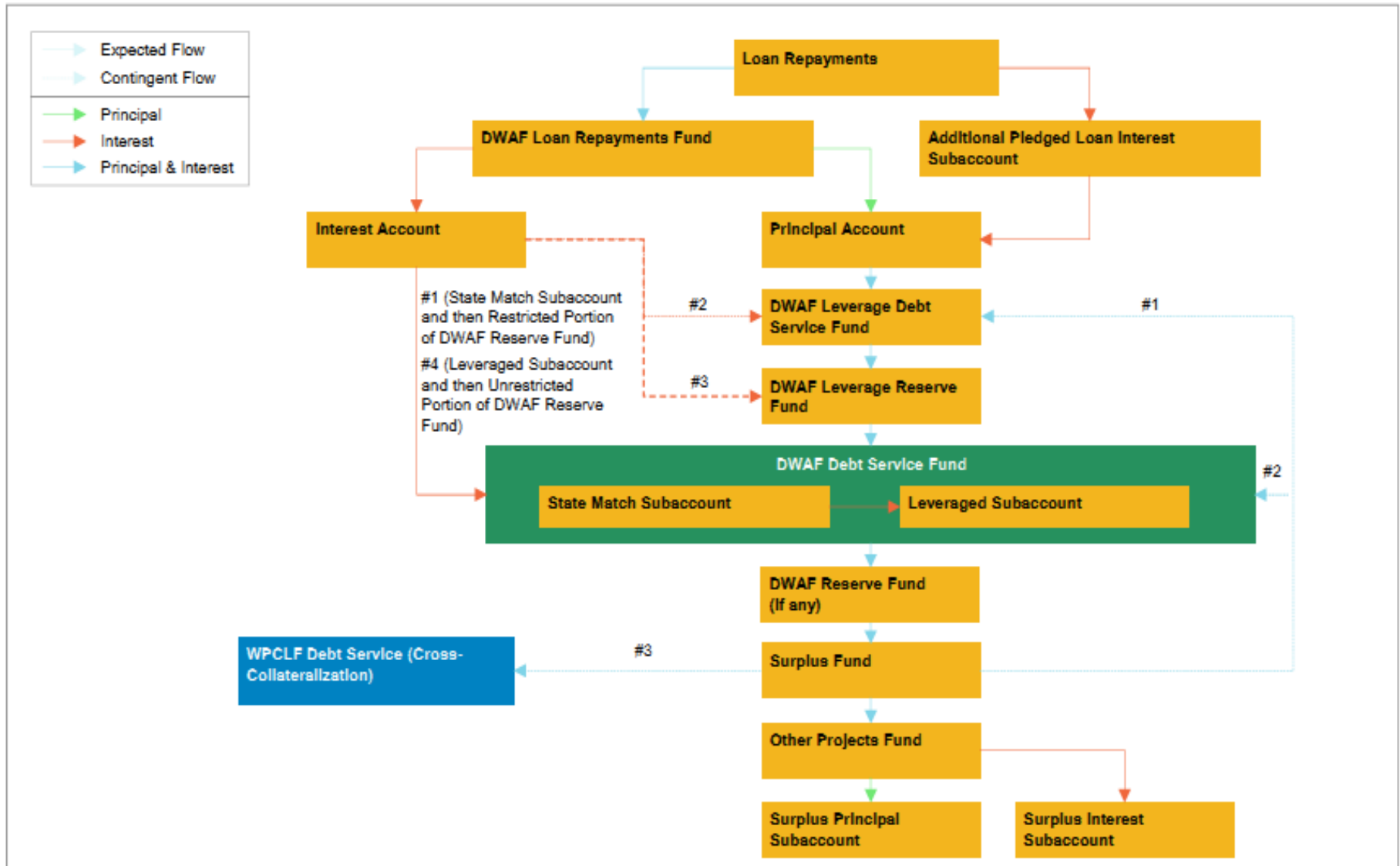
DWAF Bondholder Security



Security Feature	Details
DWAF Revenues Pledged to Leverage & DWAF Bonds:	<ul style="list-style-type: none"> ▪ Principal and interest repayments on all pledged loans which are secured by the Governmental Agency’s promise to pay from water rates and charges. OWDA has covenanted not to issue senior Leverage bonds except to refund outstanding Leverage bonds
Coverage Pledge:	<ul style="list-style-type: none"> ▪ Minimum 1.00x coverage from existing loan repayments for DWAF Bonds
Additional Coverage and Security:	<ul style="list-style-type: none"> ▪ Payments from future loans made from DWAF bond proceeds ▪ Balance of and interest earnings on: <ul style="list-style-type: none"> – Debt Service Fund – Debt Service Reserve Fund (if any) – Direct Payments ▪ With respect to the DWAF Portion only: <ul style="list-style-type: none"> – Unencumbered balance of Net Bond Proceeds Fund – Unencumbered balance of Capitalization Grant Subaccount
Debt Service Reserve Funds:	<ul style="list-style-type: none"> ▪ The Series 2021A DWAF Bonds <u>will not</u> be secured by a Debt Service Reserve Fund (no DWAF bonds are secured by a Debt Service Reserve Fund)
Cross-Collateralization:	<ul style="list-style-type: none"> ▪ Cross-collateralization through investment between the WPCLF and DWAF Programs provides additional security and greater portfolio diversification for bonds issued under both programs ▪ Allows the WPCLF and DWAF to achieve an enhanced security through access to the other Program’s surpluses
Additional Bonds Test:	<ul style="list-style-type: none"> ▪ Must meet coverage (100%) pledge with payments of loans already made, and ▪ DSRF balance for the series of DWAF Bonds being issued is equal to or exceeds the Required Reserve Fund Balance



DWAF Program Cash Flow and Pledged Funds



Note: Diagram is for illustrative purposes only and is in no way comprehensive or definitive.

Debt Service Coverage



Existing DWAF Loans as of December 31, 2020

	A	B	C = (A - B)	D	E	F = (C - D - E)	G = (A / (B + D + E))
	Estimated Total Project Repayments (a)	Outstanding Leverage Series Debt Service	Estimated Net Revenues	Outstanding DWAF Series Debt Service (b)	DWAF Series 2021A Debt Service *	Estimated Surplus	DWAF Coverage
Date							
6/1/2021	35,584,349	5,706,481	29,877,868	15,717,625	-	14,160,243	166.09%
12/1/2021	37,029,387	5,785,675	31,243,712	17,615,125	3,300,000	13,628,587	138.68%
6/1/2022	38,818,850	5,014,619	33,804,232	20,707,625	2,500,000	13,096,607	137.55%
12/1/2022	39,074,634	5,495,225	33,579,409	20,483,750	2,500,000	13,095,659	137.21%
6/1/2023	40,097,342	800,838	39,296,504	24,758,750	2,500,000	14,537,754	142.90%
12/1/2023	39,143,863	726,150	38,417,713	24,420,125	2,500,000	13,997,588	141.59%
6/1/2024	42,244,899	707,250	41,537,649	24,080,375	2,500,000	17,457,274	154.81%
12/1/2024	42,071,585	-	42,071,585	23,739,500	2,500,000	18,332,085	160.34%
6/1/2025	41,547,398	-	41,547,398	23,402,500	2,500,000	18,144,898	160.40%
12/1/2025	41,391,197	-	41,391,197	23,071,750	2,500,000	18,319,447	161.86%
6/1/2026	42,952,857	-	42,952,857	22,737,375	2,500,000	20,215,482	170.20%
12/1/2026	39,903,249	-	39,903,249	21,396,625	2,500,000	18,506,624	166.98%
6/1/2027	39,238,806	-	39,238,806	20,584,625	2,500,000	18,654,181	169.98%
12/1/2027	39,054,719	-	39,054,719	20,283,750	2,500,000	18,770,969	171.41%
6/1/2028	37,099,951	-	37,099,951	18,981,500	2,500,000	18,118,451	172.71%
12/1/2028	35,415,176	-	35,415,176	18,202,875	2,500,000	17,212,301	171.06%
6/1/2029	33,690,342	-	33,690,342	18,440,375	2,500,000	15,249,967	160.89%
12/1/2029	33,158,983	-	33,158,983	18,171,500	2,500,000	14,987,483	160.41%
6/1/2030	32,272,740	-	32,272,740	13,321,150	7,500,000	18,951,590	155.00%
12/1/2030	31,373,797	-	31,373,797	12,754,475	7,375,000	18,619,322	155.86%
6/1/2031	30,378,180	-	30,378,180	12,522,800	7,250,000	17,855,380	153.64%
12/1/2031	29,844,718	-	29,844,718	12,385,950	7,125,000	17,458,768	152.96%
6/1/2032	29,053,045	-	29,053,045	12,249,100	7,000,000	16,803,945	150.93%

*Preliminary, subject to change. Please refer to the following page for footnotes to this table.

Debt Service Coverage



Existing DWAF Loans as of December 31, 2020

	A	B	C = (A - B)	D	E	F = (C - D - E)	G = (A / (B + D + E))
Date	Estimated Total Project Repayments (a)	Outstanding Leverage Series Debt Service	Estimated Net Revenues	Outstanding DWAF Series Debt Service (b)	DWAF Series 2021A Debt Service *	Estimated Surplus	DWAF Coverage
12/1/2032	28,660,579	-	28,660,579	12,112,250	6,875,000	16,548,329	150.95%
6/1/2033	28,222,252	-	28,222,252	11,975,400	6,750,000	16,246,852	150.72%
12/1/2033	27,629,808	-	27,629,808	10,838,550	6,625,000	16,791,258	158.21%
6/1/2034	27,078,584	-	27,078,584	11,211,250	6,500,000	15,867,334	152.89%
12/1/2034	26,729,173	-	26,729,173	11,084,400	6,375,000	15,644,773	153.09%
6/1/2035	25,872,983	-	25,872,983	9,957,550	6,250,000	15,915,433	159.64%
12/1/2035	25,286,362	-	25,286,362	10,325,250	6,125,000	14,961,112	153.71%
6/1/2036	25,092,456	-	25,092,456	10,195,900	6,000,000	14,896,556	154.93%
12/1/2036	24,670,878	-	24,670,878	10,066,550	5,875,000	14,604,328	154.76%
6/1/2037	24,245,085	-	24,245,085	9,937,200	5,750,000	14,307,885	154.55%
12/1/2037	23,350,538	-	23,350,538	9,307,850	5,625,000	14,042,688	156.37%
6/1/2038	21,778,759	-	21,778,759	7,191,000	5,500,000	14,587,759	171.61%
12/1/2038	20,133,373	-	20,133,373	7,124,150	5,375,000	13,009,223	161.08%
6/1/2039	17,313,464	-	17,313,464	6,057,300	5,250,000	11,256,164	153.12%
12/1/2039	16,724,677	-	16,724,677	-	5,125,000	16,724,677	326.34%
6/1/2040	15,334,967	-	15,334,967	-	-	15,334,967	-
12/1/2040	13,989,086	-	13,989,086	-	-	13,989,086	-
6/1/2041	12,756,744	-	12,756,744	-	-	12,756,744	-
12/1/2041	10,864,697	-	10,864,697	-	-	10,864,697	-
6/1/2042	8,825,484	-	8,825,484	-	-	8,825,484	-
12/1/2042	7,962,114	-	7,962,114	-	-	7,962,114	-
6/1/2043	6,645,297	-	6,645,297	-	-	6,645,297	-
12/1/2043 - 6/1/2048	30,614,001	-	30,614,001	-	-	30,614,001	-
12/1/2048 - 6/1/2053	5,661,827	-	5,661,827	-	-	5,661,827	-
	1,325,883,254	24,236,238	1,301,647,016	577,413,825	169,550,000	724,233,191	

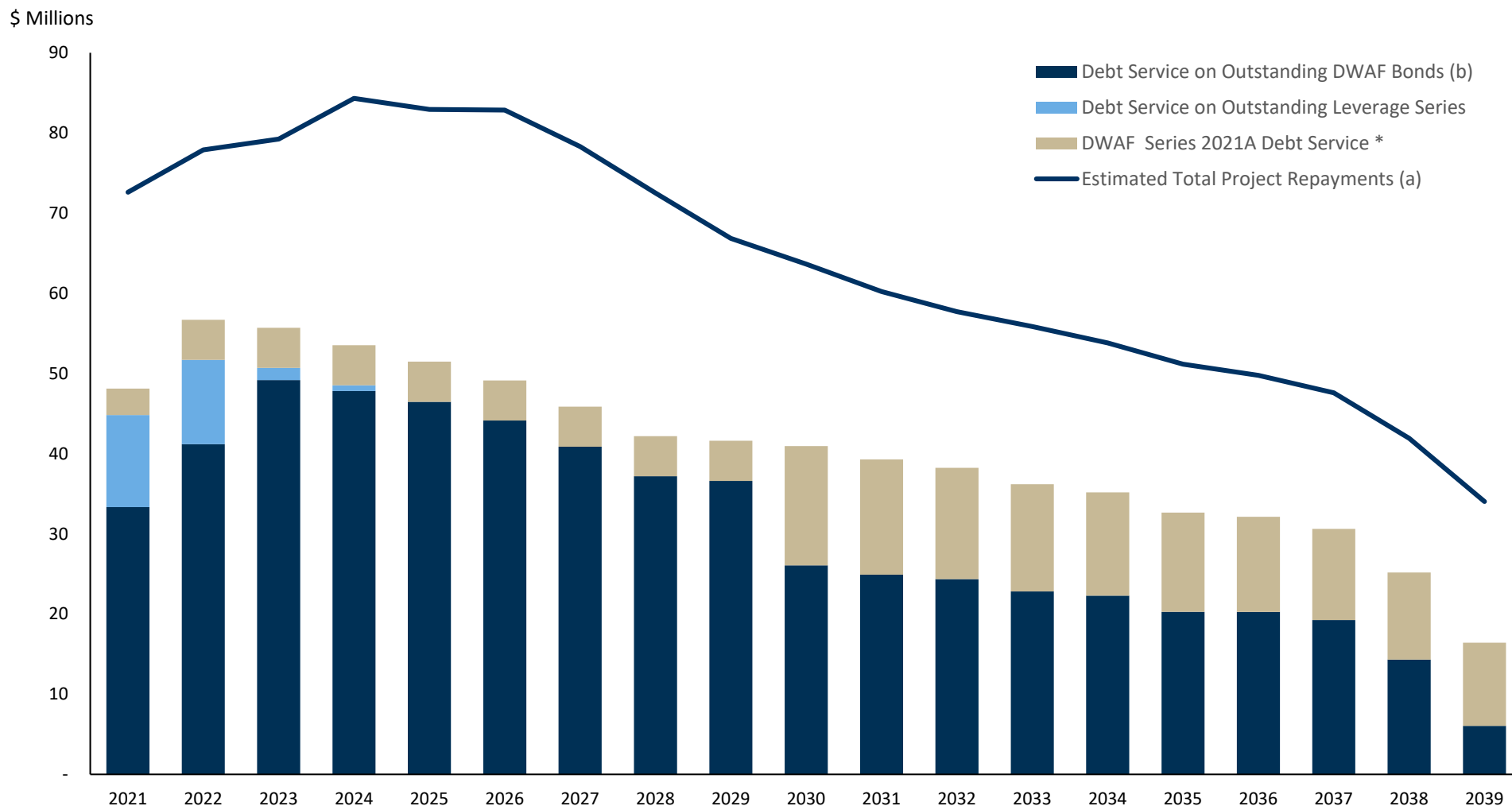
*Preliminary, subject to change; Note: The Authority has prepared the Preliminary Official Statement and investors should read the entire Preliminary Official Statement carefully before making an investment decision

- (a) The amounts shown are the pledged amounts required to be paid by Local Governmental Agencies under the Existing DWAF Loan Agreements as of 12/31/2020. Such amounts have been pledged as security for either currently issued or additional Leverage and DWAF Series Bonds. Amounts shown are semi-annual repayment amounts and do not include interest earnings thereon. Payments by the Local Governmental Agencies are due semi-annually on January 1 and July 1 of each year.
- (b) DWAF Series 2019A has actual amortization through December 1, 2029 and hypothetical debt service of the \$136,000,000 December 1, 2029 bullet maturity at 1.91% for 10 years beginning December 1, 2029.

Leverage and DWAF Debt Service Structure



Estimated Debt Service on Outstanding Leverage and DWAF Bonds After Issuance of Series 2021A*



*Preliminary, subject to change.

- (a) The amounts shown are the pledged amounts required to be paid by Local Governmental Agencies under the Existing DWAF Loan Agreements as of 12/31/2020. Such amounts have been pledged as security for either currently issued or additional Leverage and DWAF Series Bonds.
- (b) DWAF Series 2019A has actual amortization through December 1, 2029 and hypothetical debt service of the \$136,000,000 December 1, 2029 bullet maturity at 1.91% for 10 years beginning December 1, 2029.

Proposed DWAF Series 2021A Plan of Finance*



Principal	Fixed rate bonds with a serial semiannual principal amortization from June 1, 2030 to December 1, 2034 and term bonds due each December 1 from 2035 to 2039
Interest	Semiannually on June 1 and December 1, beginning on June 1, 2021
Optional Redemption ⁽¹⁾	The Series 2021A DWAF Bonds maturing on or after December 1, 2031 are subject to prior redemption by and at the sole option of the Authority in whole multiples of \$5,000, either in whole or in part (as selected by the Authority) on any date on or after June 1, 2031, at a redemption price equal to 100% of the principal amount redeemed, plus accrued interest to the redemption date.

(1) Additional redemption provisions exist; see the "THE SERIES 2021A DWAF BONDS – Redemption Provisions" section in the Preliminary Official Statement for details

Total Sources and Uses

SOURCES

Par Amount	\$ 100,000,000
Original Issue Premium (Discount)	36,239,650
Total Sources	\$ 136,239,650

USES

Deposit to DWAF Bond Subfund	\$ 135,389,650
Costs of Issuance ⁽²⁾	850,000
Total Uses	\$ 136,239,650

(2) Includes Underwriters' discount, bond counsel fees, Underwriter's counsel fees, Trustee fees, rating agency fees and other costs.

*Preliminary, subject to change. Source: Ohio Water Development Authority Preliminary Official Statement

DWAF Series 2021A (Tax-Exempt)			
Maturity Date	Principal	Interest	Debt Service
12/01/2021	\$ -	\$ 3,541,667	\$ 3,541,667
06/01/2022	-	2,500,000	2,500,000
12/01/2022	-	2,500,000	2,500,000
06/01/2023	-	2,500,000	2,500,000
12/01/2023	-	2,500,000	2,500,000
06/01/2024	-	2,500,000	2,500,000
12/01/2024	-	2,500,000	2,500,000
06/01/2025	-	2,500,000	2,500,000
12/01/2025	-	2,500,000	2,500,000
06/01/2026	-	2,500,000	2,500,000
12/01/2026	-	2,500,000	2,500,000
06/01/2027	-	2,500,000	2,500,000
12/01/2027	-	2,500,000	2,500,000
06/01/2028	-	2,500,000	2,500,000
12/01/2028	-	2,500,000	2,500,000
06/01/2029	-	2,500,000	2,500,000
12/01/2029	-	2,500,000	2,500,000
06/01/2030	5,000,000	2,500,000	7,500,000
12/01/2030	5,000,000	2,375,000	7,375,000
06/01/2031	5,000,000	2,250,000	7,250,000
12/01/2031	5,000,000	2,125,000	7,125,000
06/01/2032	5,000,000	2,000,000	7,000,000
12/01/2032	5,000,000	1,875,000	6,875,000
06/01/2033	5,000,000	1,750,000	6,750,000
12/01/2033	5,000,000	1,625,000	6,625,000
06/01/2034	5,000,000	1,500,000	6,500,000
12/01/2034	5,000,000	1,375,000	6,375,000
06/01/2035	5,000,000	1,250,000	6,250,000
12/01/2035	5,000,000	1,125,000	6,125,000
06/01/2036	5,000,000	1,000,000	6,000,000
12/01/2036	5,000,000	875,000	5,875,000
06/01/2037	5,000,000	750,000	5,750,000
12/01/2037	5,000,000	625,000	5,625,000
06/01/2038	5,000,000	500,000	5,500,000
12/01/2038	5,000,000	375,000	5,375,000
06/01/2039	5,000,000	250,000	5,250,000
12/01/2039	5,000,000	125,000	5,125,000
Total	\$ 100,000,000	\$ 69,791,667	\$ 169,791,667



Stable High-Quality Program



- The Drinking Water Assistance Fund was created as a stand-alone, self-sufficient financing program in 1997
- No reliance on State funding to the SRF Programs
- Strong record of enforcing revenue collection and legal enforcement
- 50-year track record of managing loan programs for communities throughout the State of Ohio

Sizeable / Diverse Loan Pool for Strong Collateral



- As of December 31, 2020, there were 233 Governmental Agencies with 598 Projects financed through the DWAF
- A total of \$1.634 billion in principal amount of Existing DWAF Loans have been made, with a principal balance of \$1.196 billion outstanding
- Top 10 Borrowers constitute approximately 61.10% of the total projected remaining repayments pursuant to existing loan agreements
- The City of Columbus (25.24%) and City of Toledo (7.75%) are the programs two largest borrowers

Cross-Collateralized Revenue



- The DWAF is cross-collateralized with the Water Pollution Control Loan Fund (“WPCLF”)
- Cross-collateralization between the DWAF and the WPCLF provides for the investment of surplus funds between the WPCLF and the DWAF to enhance the security for bonds

Financing Schedule and Contact Information*



February 2021						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28						

March 2021						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Activity	Date
Release POS and Investor Presentation	Wednesday, February 24 th
Pricing	Wednesday, March 10 th
Closing	Tuesday, March 24 th

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*Preliminary, subject to change.