

5 day training
by 4-30
\$485 -



**Ohio Association of Public Treasurers
Public Finance Officers Training Program**

June 11-15, 2018
June 10-14, 2019



**Ohio Public Finance Officers Training Institute
2018 Program Brochure**

Institute Partners
THE OHIO STATE UNIVERSITY
 JOHN GLENN COLLEGE OF PUBLIC AFFAIRS
 Association of Public Treasurers of the United States and Canada

**38th Annual
Public Finance Officers Training Program**
 June 11-15, 2018
CPFA Maintenance Program
 June 14-15, 2018

Kalahari Resort & Conference Center
 Sandusky, Ohio

OAPT Finance Officers Training
June 11-15, 2018

Topics

- ♦ **Governmental Accounting**
- ♦ **Cash Management/**
- ♦ **Banking Relations**
- ♦ **Investing Public Funds**
- ♦ **Debt Management**
- ♦ **Internal Controls/Fraud**
- ♦ **Detection**
- ♦ **Ethics & the Treasurer**
- ♦ **State Laws and Regulations**
- ♦ **Financial Reporting**
- ♦ **Revenue Collections**
- ♦ **Public Budgeting**
- ♦ **Office Procedures**
- ♦ **Political Science**
- ♦ **Oral Communications**
- ♦ **Personnel Management**



Hotel
The room rate at the Kalahari is \$119 per night. Reservations can be made by calling 1-877-525-2427 on or before **Friday, May 11, 2018**. Please ask for the **Public Finance Training by OAPT** Room Block. All rooms at the Kalahari come with complimentary water park passes (four per standard room). Parking is free.

Conference Registration
The OAPT Public Finance Officers Training Program is divided into two separate but related programs.

Whether you have not yet begun the CPFA program, have completed a portion of the program, or simply wish to maximize your educational opportunity, we offer a five-day program. We also offer a two-day maintenance program to provide part of the necessary training to re-certify your designation. Please refer to the registration form for program fees.

In addition to the program fees, there will be a cancellation fee of \$200 for the week-long program and \$100 for the two-day program after May 31, 2018.

To properly serve and accommodate participants we have a registration cut-off of June 1, 2018. Space is limited, any registrations after June 1st will be on a first come basis until the sessions are full.

Certification Credits Available

Fiscal Integrity Act

CPIM CPE CPFA ACPFA CLE

About the Ohio Public Treasurers Training Program

For over three decades the Ohio Association of Public Treasurers has been sponsoring training to advance knowledge of the most current practices in the profession. Following a program developed by the Association of Public Treasurers of the United States & Canada (APT US&C), the training program is designed to provide professional development and skills training for those in local government finance in Ohio. The three year program is a key element in attaining the professional designation of Certified Public Finance Administrator (CPFA). The training program also provides credit towards various other professional certifications.

This program provides both skills development and content specific education. The program has two components; the five-day training curriculum for those just starting, or who are part way through the certificate training; and the two-day maintenance program for those who have a certificate, but wish to gain more current knowledge in the field of public finance and/or who wish to make use of the continuing education credits available to them from the training program to maintain their various certifications.

In addition, credits toward the State Treasurer's Office CPIM program are available based on the content of the specific sessions, and continuing education credit is available for all participants.

**The Institute Sponsor:
The Ohio Association of Public Treasurers**

The Ohio Association of Public Treasurers (OAPT) was established to promote the general and professional interest of the public treasurers in their respective communities, to obtain a higher level of efficiency, to improve service with allied institutions and to inspire friendly and fraternal relationships among our members. This program is one of many educational opportunities offered by the OAPT.

This year we expect to have an exceptional program with the assistance of our partners, the *Ohio State University*, *John Glenn College of Public Affairs and the APT US&C*. They share the same commitment with the OAPT in providing public finance officers with a valuable learning experience in a friendly atmosphere.

Today the OAPT has over 400 members representing communities from all over the State of Ohio and over 100 associate members. For over three decades we have been offering our members, and other public finance professionals, training and other skills development.

The Certification Programs

CPFA—To be eligible for this prestigious designation, an individual must be the elected or appointed treasurer, deputy or assistant treasurer, employee in/or dealing with the office of the treasurer or principal officer in the governmental entity who is charged with the performance or supervision of one or more of the following responsibilities: investments, debt or treasury. The APT US&C certification requires 100 hours of training pursuant to their curriculum. There are other requirements related to education and experience before the certificate is awarded. This training program is one step, but certainly a major step along the path towards earning CPFA designation. Twenty-four months of membership in the APT US&C national association is also required.

CPIM—The Ohio Treasurer of State's Center for Public Investment Management (CPIM) provides Ohio public funds managers with high-quality instruction in the areas of investments and cash management, as prescribed by Ohio Revised Code section 135.22, by providing their own training and by partnering with professional organizations, like the OAPT. For more information, visit the Ohio Treasurer of State's website at: www.tos.ohio.gov. The OAPT program has provided attendees with more than sufficient CPIM hours to meet the 6 hour annual requirement.

CPE Credit—This program qualifies for Continuing Professional Education credit for Certified Public Accountants.

Fiscal Integrity Act Training Requirements

In 2015 new rules came into effect as a result of HB10/SB6 which require on-going training for Fiscal Officers in Ohio. For more information, visit the Ohio Auditor of State's website at: www.ohioauditor.gov. This program, by offering CPIM credit and Ethics training, will qualify for FIA required hours.

CLE—Continuing Legal Education for Attorneys.

Special Events and Features of the Program

On Wednesday afternoon we will coordinate a social outing to one of the many points of interest in the Sandusky Lakefront area.

The program includes breakfast daily, lunch on M, T, & TH, coffee/snack breaks, and there will be a banquet for all participants on Thursday evening.

Attire is Casual or Business casual, including the banquet. Also, bring a sweater for the air conditioned conference center.

Scholarships applications are available on our website at www.ohioapt.org and click on the public finance officer training tab.

Registration

On-line registration is the preferred method, go to: www.ohioapt.org and click on the Public Finance Officer Training tab, you can also use a credit card to pay on-line, or use this form with a check.

Five-day Training Program
Before April 30, 2018 \$485
April 30th or later \$525

Two-day Maintenance Program
before April 30, 2018 \$285
April 30th or later \$325

Banquet Guest \$40

Make Check Payable to:
Ohio Association of Public Treasurers
2113 Oaklawn Drive
Parma, OH 44134

Registration Information

Name and Title _____

Public Entity _____

Address _____

Telephone number _____

E-mail address _____

Other Information
This is my 1st 2nd OR 3rd Year
Meals I require vegetarian meals

I do do not plan to attend the Thursday evening banquet

Program Contacts:
Sal Talarico, Director of Education
OAPTEducation@gmail.com
Jack Krise, Jr., Executive Director

