



**Ohio Association of Public Treasurers  
Public Finance Officers Training Institute - June 10-14, 2019  
Maintenance Program June 13-14, 2019  
Kalahari Resort & Conference Center**



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**CPIM, CPE, CPFA, ACPFA, CLE are ALL APPROVED**

**Class # of  
# Hours**

**Sunday, June 9th Hotel Check-in**

**Monday, June 10th**

7:15-7:45 am **Registration & Breakfast**  
7:45-8:00 am **Welcome & Introductions**

	2.4	2.0	1	2	8:00-10:00 am	<b>Electric Avenue: Plotting Your Electronics Records Mgmt Path &amp; Various Storage Formats</b> Ohio State University, Pari Swift, University Records Manager
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10:00-10:15 am **Break**

	2.0	2.4	2.0	2	2	10:15-12:15 pm	<b>Principles of Public Finance</b> Bricker & Eckler, Rebecca Princehorn, Esq. and Paul Ruttner, Esq.
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12:15-1:15 pm **Lunch**

	2.0	2.4	2.0	3	2	1:15-3:15 pm	<b>Treasury Management Solutions</b> Westfield Bank, Jarrod Long, Treasury Management Leader
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3:15-3:30 pm **Break**

	2.4	2.0	4	2	3:30-5:30 pm	<b>Personnel Management Do's and Don'ts</b> Clemans, Nelson and Associates, Drew Esposito, Shareholder and Account Manager
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6:00 - 8:00 pm **Networking Event at the Marrakesh - food and refreshments**

**Tuesday, June 11th**

7:30-8 am **Breakfast**

	2.0	2.4		5	2	8-10 am	<b>Integrating Scanning and Electronic Approvals into Your Accounting/Payables Systems</b> Software Solutions Inc., Trent Corbin, Implementation Project Manager
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10-10:15 am **Break**

	2.0	2.4		6	2	10:15-12:15 pm	<b>Public Budgeting: Effective Budgeting and Best Practices to Meet Organizational Goals</b> Prashant Shah, Finance Director, City of Westlake
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12:15-1:15 pm **Lunch**

	3.6	*	7	3	1:15-4:30 pm	<b>Sunshine Laws Certified Training</b> Attorney General's Office, Mark Altier, Chief of Opinions
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\* CLE hours for this course must be submitted through the Attorney General's Office

**Wednesday, June 12th**

7:30-8 am **Breakfast**

	2.0	2.4	2.0	8	2	8-10:00 am	<b>What is Going on in the Tax-Exempt Market and How Does it Affect Me?</b> Sudsina & Associates, Mike Sudsina, President; Stephen Szanto, Managing Director Greg Van Wagen, Senior Advisor; Gina Deppert, Sandusky Schools Treasurer/CFO
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10-10:15 am **Break**

	2.4	2.0	9	2	10:15-12:15 pm	<b>Written Communications: Framing and Articulating Ideas through Writing</b> Weltman, Weinberg & Reis, Co., L.P.A., Sara Costanzo, Attorney/Shareholder
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12:15 pm **Open Afternoon, Join our Networking Event OR Enjoy Sandusky and the Lake Erie Shores!**



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**Thursday, June 13th**

7:30-8 am **Registration & Breakfast**

	2.0	2.4	2.0
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**10 2** 8-10 am **The Ohio Ethics Law: Good Government in Action!**  
 Ohio Ethics Commission, Susan Willeke, Training & Communications Manager

10-10:15 am **Break**

2.0	2.0	2.4	
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**11 2** 10:15-12:15 pm **Case Study in Investing in Today's Market Environment**  
 Meeder Investment Management, Jason Click, President; Dennis Yacobozzi, President;  
 Jason Headings, Vice President; Eileen Stanic Senior Public Funds Advisor

12:15-1:15 pm **Lunch**

		1.2	1.0
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**12 1** 1:15-2:15 pm **What are You doing to Enhance Your Community's Most Valuable Asset?  
 Your Image and Reputation!**  
 The Impact Group, Tom Speaks, Principal

2:15-2:30 pm **Break**

	2.0	2.4	2.0
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**13 2** 2:30-4:30 pm **Cash Management/Banking Relations: Overview and Insight into Enhancing Bank Relationships**  
 USBank, Steve Broerman, VP; Huntington Bank, Maureen Shildwachter, VP

6-7 pm **Reception**  
 7-9 pm **Awards Banquet**

**Friday, June 14th**

7:30-8 am **Breakfast**  
 8 - 8:15 am **OAPT Workers Compensation Group Update, Scott Weisend, CompManagement, Inc.**

		2.4	2.0
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**14 2** 8:15-10:15 am **The Chameleon Communicator - How to Communicate with different Generations and with  
 Difficult Personalities in the Workplace**  
 Zashin & Rich, Brad Bennett, Attorney

10:15-10:30 am **Break**

2.0	2.0	2.4	2.0
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**15 2** 10:30-12:45 pm **Technology Preparation and Recovery: Are you Ready for Failure?**  
 David Sems, Director of Communications and Technology, City of Strongsville  
**11:30-11:45 am Break - Pick up boxed lunch return to session for a working lunch**

**30 Total Hours**

	18.0	36.0	21.0	<b>TOTAL - Weeklong</b>
4.0	8.0	13.2	9.0	<b>TOTAL - Maintenance</b>

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**Training Institute End - Drive Safely**

**Monday through Friday Program = 20 CPFA Points ^  
 Thursday and Friday Only = 5.5 CPFA Points \***

\* If you have already received your CPFA = 4 ACPFA & 3.5 CPFA  
 ^ 15 CPFA Points in Years 1 and 2; 20 CPFA Points in Year 3  
 2019 is year 3 - participants can start anywhere in the 3 year cycle

**Registration information online at [www.ohioapt.org](http://www.ohioapt.org) Contact: [OAPTEducation@gmail.com](mailto:OAPTEducation@gmail.com)**