



**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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F	I	P	L	Class # of	
A	M	E	E	# Hours	

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

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	Electric Avenue: Plotting Your Electronics Records Mgmt Path & Various Storage Formats 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	Principles of Public Finance 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	Treasury Management Solutions 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	Personnel Management Do's and Don'ts Clemans, Nelson and Associates, Drew Esposito, Shareholder and Account Manager
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Tuesday, June 11th

7:30-8 am **Breakfast**

2.0	2.4		5	2	8-10 am	Integrating Scanning and Electronic Approvals into Your Accounting/Payables Systems 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	Public Budgeting: Effective Budgeting and Best Practices to Meet Organizational Goals 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	Sunshine Laws Certified Training Attorney General's Office, Mark Altier, Chief of Opinions <i>* CLE hours for this course must be submitted through the Attorney General's Office</i>
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Wednesday, June 12th

7:30-8 am **Breakfast**

2.0	2.4	2.0	8	2	8-10:00 am	What is Going on in the Tax-Exempt Market and How Does it Affect Me? 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	Written Communications: Framing and Articulating Ideas through Writing Weltman, Weinberg & Reis, Co., L.P.A., Sara Costanzo, Attorney/Shareholder
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Thursday, June 13th

							7:30-8 am	Registration & Breakfast
		2.0	2.4	2.0	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	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	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	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	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	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	TOTAL - Weeklong
4.0	8.0	13.2	9.0	TOTAL - Maintenance

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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 Contact: OAPTEducation@gmail.com