



OHIO ASSOCIATION OF PUBLIC TREASURERS Hot Topic Seminar – April 26, 2019

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This Hot Topic Seminar is packed with information to assist public finance officers in the performance of their duties. Topics include a legislative update on Workers Compensation and a deferred compensation update. We will also key in on Public Banking relationships, how to prepare an RFP that will help your banking services decision making, and some tips on Negotiating a higher earnings credit. And more, we will also have sessions on Healthcare Strategies and Banking Fraud & Cyber Risks/Liability.

Speakers:

- Scott Weisend**, Comp Management
- Lorraine Harper**, Director of Government Banking, Key Bank
- Garrett MacDonald**, Three+One
- Tony Okray**, Government Banking Relationship Manager, Huntington Bank
- Michael Bartolini and Bob Sankey**, First Commonwealth Insurance Agency
- William Matejka**, Buckeye Deferred Comp

Date: April 26, 2019

Agenda:

8:30 a.m. – 9:00 a.m.	Continental Breakfast & Registration
9:00 a.m. – 9:30 a.m.	Workers Compensation Group Update, AC3 and group rating Ohio APT Workers Comp Pool, Scott Weisend
9:30 a.m. – 10:30	Public Banking Today, Tomorrow, and into the Future?, Lorraine Harper and Garrett MacDonald
10:30 a.m. – 12:00	Public Entities' Healthcare Strategy, Michael Bartolini and Bob Sankey
12:00 p.m. – 1:00 p.m.	Lunch
1:00 p.m. – 2:30 p.m.	Fraud & Cyber Risk/Liability, Tony Okray
2:30 p.m. – 3:00 p.m.	Deferred Comp update, William Matejka

Location: Der Dutchman Restaurant – Bellville, Ohio
720 SR 97 West, Bellville Ohio 44813, 419-886-7070

Cost: \$40 for member, \$60 for non-members
Continental Breakfast, Buffet Lunch and Der Dutchman's Famous Pies Included
You can register and pay on-line, see registration form for details

REGISTRATION FORM

NAME: _____ TITLE _____
PUBLIC ENTITY: _____
ADDRESS: _____
CITY _____ STATE _____ ZIP _____
EMAIL: _____
ADDITIONAL ATTENDEE: _____

Cost: \$40 member, \$60 non-member – Total \$ _____

Please Make Checks Payable to:
Ohio Association of Public Treasurers [or Register and Pay on-line, see below]
2113 Oaklawn Drive, Parma, Ohio 44134

[Register and pay on-line at www.OhioAPT.org](http://www.OhioAPT.org)
[click OAPT Hot Topic page](#)

Email Contact: OhioTreasurers@gmail.com

Speaker Biographies Available online



Ohio Association of Public Treasurers
2113 Oaklawn Drive
Parma, Ohio 44134

Biographies

Scott Weisend, Client Services Representative - Prior to rejoining CompManagement in 2015, Scott served as the Managing Director of Workers' Compensation Services for the Ohio Manufacturers' Association. In that role, he provided executive oversight for all workers' compensation third party administration operations, sales and management. Prior to this role, Scott served as a Sales Executive for CompManagement from 2010 to 2013. Scott spent over 22 years with the Frank Gates Service Company / Avizent. He served in a variety of capacities during that time, but his last position was Assistant Vice President, Account Executive State Fund. While serving in that role, he had direct responsibility for client service, client retention, sales as well as conversions of State Fund employers to Self Insurance and Self Insurance Sales. Scott also managed several association group programs and served as an Ohio Self-Insurance Account Executive as well as National Account Executive while at Frank Gates/Avizent. Scott also served as Vice President for Ohio Examworks for one year. As mentioned above, Scott rejoined CompManagement in 2015 as a Sales Executive. Scott is responsible for Ohio Sales and growing our Ohio client base for State Fund and Self Insurance. Scott is knowledgeable in Ohio State Fund claims, alternative rating programs and Ohio Self Insurance. Scott obtained his Bachelor of Arts from Ohio Dominican University.

Lorrie Harper is Director of Government Banking at Key Bank. She directs national and regional strategies for Government Service line of business. Ensures success of the sales and service team by developing financial goals and best practices for expanding public sector business. Responsible for development and execution of programs to collaborate with other municipal lines of business within KeyBank to broaden full financial service offerings to government clients. Prior positions include Fifth Third Bank Vice President, Government & Institutional Sales & Relationship Manager and served as the relationship manager for Public, Non-Profit, and Higher Education clients. Senior Vice President, Commercial Public Funds Manager PNC Bank (formerly National City Bank). Managed relationships with public entities including public higher education, counties, municipalities, school districts housing authorities, federal agencies, and libraries. Managed sales and service responsibilities associated with banking needs across depository, lending, treasury, and trust lines of business. Lorrie has a Bachelor of Arts, Accounting & Economics, Ohio Wesleyan University. She has a FINRA Series 7, FINRA Series 63, Certified Treasury Professional Designation (CTP) (Inactive) and Subject Matter Expert – Certified as Trainer for State of Ohio, CPIM

Garrett MacDonald has been partnering with public officials to generate measurable and sustained public value through increased interest earnings and savings since joining Three+One® in 2015. He has worked cooperatively with governing bodies, public finance officials, and financial institutions to help bring strategic initiatives to the public sector that lowers internal costs and positively impact tax levies. Prior to joining Three+One, he traveled widely, both domestically and internationally, bringing efficiency resource management to non-profits in places as far-flung as Singapore, Indonesia, and Great Britain. Garrett attended St. John Fisher College in Rochester, N.Y., where he graduated magna cum laude with a B.S. in Corporate Finance. He went on to earn his MBA there with high distinction. While at Fisher, he received recognition for his scholastic accomplishments and community service. Garrett was also invited to join Beta Gamma Sigma, the highest honor a business scholar can receive from an AACSB-accredited institution. He was a research contributor to and co-author of a textbook and an academic publication that concentrated on financial instruments and corporate sustainability. Through the Association of Finance Professionals, Garrett earned his Certified Treasury Professional® designation. More recently, he earned a certificate in "Artificial Intelligence: Implications for Business Strategy" from the Massachusetts Institute of Technology.

Tony Okray is currently working as a Government Banking Relationship Manager for Huntington Bank. My geographic areas will be concentrated in Stark, Summit, Medina, Portage, and surrounding counties. I have worked in a variety of Retail and Commercial Bank functions throughout my banking career. The majority of my last 20 years have been spent in Treasury Management and Public Funds (Government Banking). Previously I was Vice President and Team Leader for the Treasury Management department at FirstMerit Bank. My team leader management role covered the states of Ohio and Western PA. I also served in the role as SVP at CFBank which involved management for the bank wide cash management program, along with sales and account management for accounts in the Canton, Akron, and greater Cleveland markets.

Michael Bartolini – as the President of First Commonwealth Insurance Agency, Michael oversees all aspects of the firm's operation and is tasked with developing the company's vision into the future. Throughout his 20-year career at First Commonwealth, Michael has worked diligently to contribute to the overall success of the company. His tenure with the firm began in 1996 as a Business Development Specialist until the year 2000, when he was promoted to manage and grow the Employee Benefits unit of FCIA. Throughout the last 20 years, he has held several management roles within the company focusing on various areas of Employee Benefits, Personal & Commercial Property & Casualty Insurance, and Life and Health Departments and was named the President and CEO of FCIA in November of 2012. Michael serves as a member of the Marsh Berry's BANK National Strategic Issues Group for Bank-Held Insurance Firms; The American Bankers Insurance Association Member; and National Health Underwriters Member. In addition to his professional responsibilities, he is committed to the development and support of his community through serving as on the Board of Directors of the Blairsville Saltsburg School District, Board of Directors for Indiana Regional Hospital Healthcare Foundation; Youth Football, Baseball, & Basketball Coach, and a member of the Nowrytown Sportsmans Club and the Saltsburg American Legion. Michael received his Bachelor of Arts degree from Allegheny College where he majored in Communications and minored in Psychology. He is a fully licensed insurance agent in Pennsylvania, specializing in Life, Accident, Health, and PA Property Casualty coverages.

Robert Sankey has worked in the finance & delivery of health care for more than 30 years, most recently joining the First Commonwealth Insurance Agency team in 2015. Robert's aim focuses on the redevelopment and deployment of new health care ecosystems based on transparent pricing, cost efficiencies and improved patient outcomes. Robert is certified as a Health Rosetta Advisor, one of only 140 consultants across the nation representing 4 million members. This ensures he consistently provides prudent, insightful and innovative solutions, helping organizations achieve ongoing and uninterrupted success. Robert's area of expertise is consultative business services including Strategic Planning, Cost Projection & Predictive Modelling, Risk Mitigation, Alternate Payment Models, Direct Contract & Direct Primary Care initiatives and Reference-Based Reimbursement. Robert specializes in helping organizations reach their fullest potential. He has assisted employer groups from 10 employees to over 10,000, both local and national organizations. Among his professional designations are: Fully-licensed in Health, Property Casualty and Life & Disability Insurance. Health Rosetta Certified Benefits Advisor, Certification through Pennsylvania Association of Nonprofit Organizations (PANO). Robert attended Point Park University for Behavioral Health and Industrial Sociology and has served on numerous nonprofit boards and community organizations, including eight years as a Volunteer Firefighter in Pittsburgh. Robert is a conservation steward and an avid fly fisherman residing in Brush Valley, PA, with his wife Kathy.

Bill Matejka is a Craftsman and teacher at his core, Bill is centered on building client knowledge, and helping form and secure their vision. His method is adaptable and comprehensive, tapping into 20+ years' experience in economics, financial planning, and asset management. Simply put: Bill is an earnest, loyal advisor. He is a professional who forms long-term, relationships so he can give personal recommendations to every client for their unique situation.