



**Ohio Association of Public Treasurers
Public Finance Officers Training Institute - June 14-18, 2021
Maintenance Program June 17-18, 2021
Kalahari Resort & Conference Center**



A
C
P
F
A
C
P
I
M
C
P
E
C
L
E

Class # of
Hours

CPIM, CPE, CPFA, ACPFA and CLEs - ALL APPROVED

Sunday, June 13th Hotel Check-in

Monday, June 14th

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

2.0 2.4 2.0

1 2 8:00-10:00 am The Slow Moving Train: Disaster Preparedness and Recovery in the Twenty-First Century
Tina Ratcliff, Montgomery County Records & Information Manager

10:00-10:15 am **Break**

2.0 2.4 2.0

2 2 10:15-12:15 pm Effective Bond Structuring in Today's Market
Harold Babbit, Adjunct Professor of Local Government, Cleveland Marshall College of Law
Mike Sudsina, Steve Szanto, Michael Prcela and Greg Van Wagnen, Sudsina & Associates

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

2.0 2.4 2.0

3 2 1:15-3:15 pm Cash Management Tools to Improve Cash Flow & Bidding Banking Services
Krystle Kite, First Commonwealth Bank, SVP Treasury Mgmt and Kory Scott, CTP Product Mgr

3:15-3:30 pm **Break**

2.4 2.0

4 2 3:30-5:30 pm Cyber – How vulnerable are you?; Direct Primary Care – Have you seen your Dr. lately?; and
Deferred Compensation Programs (457) - How fiduciary liable are you?
Lacy Rex, VP, Cyber Strategic Leader; William F. Fisher, VP, Middle Market Practice Leader; Oswald
Companies and David M. Kulchar, AIF, Exec VP & Dir of Retirement Plan Services, Oswald Financial

6:00 - 8:00 pm **Networking Event at the Marrakesh - food and refreshments**

Tuesday, June 15th

7:30-8 am **Breakfast**

2.0 2.4 2.0

5 2 8-10 am Cyber Defense: Best Practices for Data Breach Prevention, Detection and Remediation
David E. Sems, CPA, CITP, CFF (Director of Communications & Technology - City of Strongsville) and
Paul G. Sems (Practice Lead, Remediation Services - TrustedSec)

10-10:15 am **Break**

2.0 2.4 2.0

6 2 10:15-12:15 pm Internal Controls and Fraud Detection - current fraud schemes and prevention/detection methods
Derek Conrad, Principal – Government Services, Rea & Associates, Inc.

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

2.0 2.4

7 2 1:15-3:15 pm Basics of Investing Public Funds
Eileen Stanic, Sr. Public Funds Advisor, Meeder Investment Management
Erich Buckenmaier, Managing Director, Promontory Interfinancial Network (CDARS)

3:15-3:30 pm **Break**

2.4 2.0

8 2 3:30-5:30 pm The Non-Human Resources Professional's Guide to Managing HR
Mark Fiala, Organizational Architecture, Inc.

Wednesday, June 16th

7:30-8 am **Breakfast**

2.0 2.4

9 2 8-10:00 am Governmental Financial Reporting
Alyssa Kerker, Professor, Franciscan University of Steubenville

10-10:15 am **Break**

2.0 2.4 2.0

10 2 10:15-12:15 pm Revenue Collections - show me the money
Sara Costanzo, Shareholder/Attorney, Weltman, Weinberg & Reis, Co., LPA

12:15 pm **Open Afternoon, Join our Networking Event OR Enjoy Sandusky and the Lake Erie Shores!**



**Ohio Association of Public Treasurers
Public Finance Officers Training Institute - June 14-18, 2021
Maintenance Program June 17-18, 2021
Kalahari Resort & Conference Center**



A
C
P
F
A
C
P
I
M
C
P
E
L
L
E

**Class # of
Hours**

CPIM, CPE, CPFA, ACPFA and CLEs - ALL APPROVED

Thursday, June 17th

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

2.0	2.4	2.0
-----	-----	-----

11 2

8-10 am

The County Budget Commission – Overview, Understanding, and Preparedness
Chuck Walder, Geauga County Auditor and Alex Zumbar, Stark County Treasurer

10-10:15 am **Break**

2.0	2.0	2.4	
-----	-----	-----	--

12 2

10:15-12:15 pm

Evolution of the Federal Reserve by Jason Click, President Meeder Public Funds
How to: Building a Successful Investment Program by Jason Headings, SVP Meeder Public Funds

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

	1.2	1.0
--	-----	-----

13 1

1:15-2:15 pm

How to Elevate Your Communication Strategy
Adina Magda, Senior Marketing Manager, Weltman, Weinberg & Reis Co., LPA

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

2.0	2.4	2.0
-----	-----	-----

14 2

2:30-4:30 pm

Cash Management and Banking Relations
USBank, Steve Broerman, VP Government Banking, Huntington Bank, Maureen Schildwachter,
VP Government Banking, and Chase Bank, Joe Farris, VP Government Banking

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

Friday, June 18th

7:30-8 am **Breakfast**
7:45-8 am **OAPT Workers Compensation Group Update, Scott Weisend, CompManagement, Inc.**

2.0	2.4	2.0
-----	-----	-----

15 2

8-10 am

The Ohio Ethics Law: The 20/20 Vision!
Susan Willeke, Ohio Ethics Commission, Education & Communications Manager

10-10:15 am **Break**

2.0	2.0	2.4	2.0
-----	-----	-----	-----

16 2

10:15-12:15 pm

Principles of Public Finance: Special Purpose Money and the Pipeline Valuation Saga
Becky Princehorn, Partner in the Public Finance Group and Robert McCarthy, Bricker & Eckler LLP

12:15-12:30 pm **Break - Pick up boxed lunch for working lunch**

1.0	1.0	1.2	1.0
-----	-----	-----	-----

17 1

12:30-1:30 pm

Public Infrastructure Investment within the Economic Development Framework
Evan Scurti, Principal/Founder, Scurti Consulting LLC

32 Total Hours

5.0	27.0	38.4	26.0
5.0	11.0	14.4	10.0

A C C C
C P P L
P I E E
F M
A

Training Institute End - Drive Safely

**Monday through Friday Program = 17 CPFA Points ^
Thursday and Friday Only = 6 CPFA Points ***

** If you have already received your CPFA = 5 ACPFA & 3.5 CPFA*

*^ 3-year Program Provides a Total of 50 CPFA Points - CPFA hours are based on total hours + 2 hours for Peer Knowledge Sharing
2021 is year 1 - participants can start anywhere in the 3 year cycle*

Registration information online at www.ohioapt.org Contact: OAPTEducation@gmail.com