



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



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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  
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

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?  
Christopher Kakish, JD, VP, Senior Client Exec; William F. Fisher, VP, Middle Market Practice Leader; Oswald  
Companies and Scott Kimble, Team Leader, Wealth Management, 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!**



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**Thursday, June 17th**

					7:30-8 am	<b>Registration &amp; Breakfast Welcome &amp; Introductions</b>				
		<b>2.0</b>	<b>2.4</b>	<b>2.0</b>	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	<b>Break</b>		
		<b>2.0</b>	<b>2.0</b>	<b>2.4</b>			12	2	10:15-12:15 pm	Evolution of the Federal Reserve by Meeder Investment Mgmt How to: Building a Successful Investment Program by Meeder Investment Mgmt
									12:15-1:15 pm	<b>Lunch</b>
			<b>1.2</b>	<b>1.0</b>			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	<b>Break</b>
		<b>2.0</b>	<b>2.4</b>	<b>2.0</b>			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	<b>Reception</b>
									7-9 pm	<b>Awards Banquet</b>

**Friday, June 18th**

									7:30-8 am	<b>Breakfast</b>
									7:45-8 am	<b>OAPT Workers Compensation Group Update, Scott Weisend, CompManagement, Inc.</b>
		<b>2.0</b>	<b>2.4</b>	<b>2.0</b>			15	2	8-10 am	The Ohio Ethics Law: Building a Culture of Integrity Susan Willeke, Ohio Ethics Commission, Education & Communications Manager
									10-10:15 am	<b>Break</b>
		<b>2.0</b>	<b>2.0</b>	<b>2.4</b>	<b>2.0</b>		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 Jackie Lewis, Bricker & Eckler LLP
									12:15-12:30 pm	<b>Break - Pick up boxed lunch for working lunch</b>
		<b>1.0</b>	<b>1.0</b>	<b>1.2</b>	<b>1.0</b>		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

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