



**Ohio Association of Public Treasurers**  
**Public Finance Officers Training Institute - June 15-19, 2020**  
**Maintenance Program June 18-19, 2020**  
**Kalahari Resort & Conference Center**



**CREDITS WILL BE AVAILABLE: CPEs, CPIMs, CPFAs, ACPFAs and CLEs**

**Class # of  
# Hours**

**Sunday, June 14th Hotel Check-in**

**Monday, June 15th**

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

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 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**

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**

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; and  
David M. Kulchar, AIF, Executive VP & Director of Retirement Plan Services

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

**Tuesday, June 16th**

7:30-8 am **Breakfast**

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**

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**

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**

8 2 3:30-5:30 pm Personnel Problem Solving - Addressing Complex Issues Facing Public Sector Employers  
Drew Esposito, Clemans Nelson and Associates

**Wednesday, June 17th**

7:30-8 am **Breakfast**

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

10-10:15 am **Break**



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**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!**

**Thursday, June 18th**

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

**11**    **2**    8-10 am    The County Budget Commission – Overview, Understanding, and Preparedness  
Chuck Walder, Geauga County Auditor and Alex Zumber, Stark County Treasurer

10-10:15 am    **Break**

**12**    **2**    10:15-12:15 pm    What's Next – Is this time different? 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**

**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**

**14**    **2**    2:30-4:30 pm    Cash Management and Banking Relations  
USBank, Steve Broerman, VP Government Banking, Huntington Bank, Maureen Shildwachter,  
VP Government Banking, and Chase Bank, Joe Farris, VP Government Banking

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

**Friday, June 19th**

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

**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**

**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**

**17**    **1**    12:30-1:30 pm    Grants Are NOT Free Money  
Vera Gatchell, Certified Grant Specialist & Administrator, Didi Everhart, CGA, Gatchell Grant Resources

**32 Total Hours**

**Training Institute End - Drive Safely**

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