



**Ohio Association of Public Treasurers
Public Finance Officers Training Institute - June 13-17, 2022
Maintenance Program June 16-17, 2022
Kalahari Resort & Conference Center**



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

Class # of # Hours

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

Sunday, June 12th Hotel Check-in

Monday, June 13th

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

2.0 2.0 2.4

1 2 8:00-10:00 am Practical controls for securing digital financial systems & Risk Management
Nick Artman, President, Addo Solutions and John Grillo, Producer, SeibertKeck Insurance Partners

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

2.0 2.0 2.0 2.4

2 2 10:15-12:15 pm Capital Financing Update 2022
Mike Sudsina, Michael Prcela, Greg Van Wagnen, and Mike Spafford with Sudsina & Associates

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

2.0 2.0 2.4

3 2 1:15-3:15 pm Financial Reporting
Chad Welty, Principal, and Mindee Johnson, Senior Manager with Rea & Associates

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

2.0 2.0 2.4 2.0

4 2 3:30-5:30 pm State Laws and Regulations – Alphabet Soup
Rebecca Princehorn, Robert McCarthy and Tess Tannehill, Partners at Bricker & Eckler LLP

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

Tuesday, June 14th

7:30-8 am **Breakfast**

2.0 2.0 2.4

5 2 8-10 am Governmental Financial Reporting
Alyssa Kerker, Professor, Franciscan University of Steubenville

10-10:15 am **Break**

2.0 2.0 2.4 2.0

6 2 10:15-12:15 pm HR Best Practices
Andrew Esposito, Mgr. Client Dev., and Amanda Riess, Account Mgr. with Clemans, Nelson and Assoc.

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

2.0 2.0 2.4 2.0

7 2 1:15-3:15 pm Hot Topics in Human Resources
Andrew Esposito, Mgr. Client Dev., and Amanda Riess, Account Mgr. with Clemans, Nelson and Assoc.

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

2.0 2.0 2.4 2.0

8 2 3:30-5:30 pm Treasury Management Solutions and Fraud Prevention
Jarrod Long, CTP, SVP and Chris Anzevino, VP with Westfield Bank

Wednesday, June 15th

7:30-8 am **Breakfast**

2.0 2.0 2.4 2.0

9 2 8-10:00 am Revenue Collections - maintaining a successful collection program
Sara Costanzo, Shareholder/Attorney, Weltman, Weinberg & Reis, Co., LPA

10-10:15 am **Break**

2.0 2.0 2.4 2.0

10 2 10:15-12:15 pm Funds, Fund Transfers, Restrictions on Expenditures; Certificates and Disposal of Public Property
Mark Altier, Legal Counsel, Governmental Agencies

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



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Thursday, June 16th

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

2.0	2.0	2.4	2.0
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11 2 8-10 am The Ohio Ethics Law: Just the Facts (of Jaw-Dropping Investigations)
Susan Willeke, Ohio Ethics Commission, Training & Communications Manager

10-10:15 am **Break**

2.0	2.0	2.0	2.4	2.0
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12 2 10:15-12:15 pm Navigating Fiscal Recovery Funds and the Uniform Guidance
Stacie Massey, Senior Financial Manager, Ohio Office of Budget and Management

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

1.0	1.0	1.2
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13 1 1:15-2:15 pm Investment Update and Current Trends
Jason Click, Pres. of Public Funds, Eileen Stanic, Sr. Public Funds Advisor, Meeder Investment Mgmt

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

2.0	2.0	2.4	2.0
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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 17th

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

2.0	2.0	2.0	2.4	2.0
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15 2 8-10 am Reserve Balance Accounts (ORC 5705.13) and the County Budget Commission
Chuck Walder, Geauga County Auditor and Alex Zumbar, Stark County Treasurer

10-10:15 am **Break**

2.0	2.0	2.4	2.0
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16 2 10:15-12:15 pm Communication and PR Skills you MUST have in Today's World
Tom Speaks, The Impact Group

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

1.0	1.0	1.0	1.2
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17 1 12:30-1:30 pm Real World Case Studies: Investing and Portfolio Management
Jason Click, Pres. of Public Funds, Eileen Stanic, Sr. Public Funds Advisor, Meeder Investment Mgmt

32 Total Hours

7.0	32.0	32.0	38.4	22.0
5.0	12.0	12.0	14.4	10.0

A	C	F	C	C
C	P	I	P	L
P	I	A	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
2022 is year 2 - participants can start anywhere in the 3 year cycle*

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