



The OHIO TREASURER



Spring 2022

*The Official Publication of the Ohio Association of Public Treasurers
Educating Public Fiscal Officers Since 1974*

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Dear Fellow OAPT Members,

As we start 2022, despite the challenges we have all faced, I am inspired by all that we have accomplished over the past few years. We have grown to over 700 members and we continue to provide educational and networking opportunities that you value in a professional and friendly environment.

Thanks to our Workers Compensation Rating Pool programs, Deferred Compensation program, and the continued support of our affiliate vendors, we can keep our membership and registration costs very affordable. Membership dues are only \$50.00 per year and includes newsletters and membership discounts to our annual conference and educational seminars. Our Hot Topic seminar will be on April 29th at the Der Dutchman in Bellville. The agenda is posted on our website, and you can earn CPE, CPIM, FIA and CPFA credits. Registration is only \$40 and includes the Der Dutchman's delicious lunch buffet and pie!

The June Public Finance Officer Training Institute is scheduled for the Kalahari Resort and Convention Center in Sandusky Ohio, June 13th-17th. The maintenance program will be June 16th & 17th. There will be an opportunity to earn CPIM, FIA, CPE's, CPFA's, ACPFA's, and CLE's. The early-bird registration for the full-week program is \$485 and \$285 for the two-day maintenance program. The Kalahari has an amazing indoor and outdoor waterpark and a premier convention center. The negotiated room rate of \$124/night also includes, at no extra charge, 4 waterpark passes. Register early to secure your spot and take advantage of the early-bird rate. You can register and pay for both your training registration and hotel reservation through our website.

The OAPT annual Fall Conference will be at the Lodge in Geneva-on-the-Lake, October 5th - 7th. We promise to provide you with a great value by keeping our registration fees low and have negotiated a room rate of \$129 per night if you use the special link and instructions on our website. We again plan to provide you with the opportunity to meet some, or all, of your professional certification requirements by attending the conference. Additionally, we will have fun networking events in the evenings. I look forward to seeing you very soon!

Sincerely,

Terri Meek

Terri Meek

President OAPT

**Ohio APT 41st Annual
Public Finance Officers Training Program
June 13 – 17, 2022
Kalahari Resort, Sandusky, Ohio**

The Ohio Association of Public Treasurer’s Annual Finance Training will be held June 13th – 17th, 2022 and the Maintenance Training will be held June 16th – 17th at the Kalahari Resort, Sandusky, Ohio. The Ohio APT has reserved a special rate of \$124 per night at the Kalahari which includes 4 water park passes.

Please make your room reservations by using the direct link on our website or by calling the Kalahari Reservation Office at 1-877-525-2427. Make sure to tell them you are attending the Ohio APT Public Finance Training OAPT urges all Public Finance Training attendees to register early with the Kalahari, special room rate is only guaranteed through May 13th.



**OHIO ASSOCIATION of PUBLIC TREASURERS
2022 Finance Training Registration**

Name _____

Public Entity _____

Title _____

Address _____

City _____ Zip Code _____

Phone _____

E-Mail Address _____

Attendee 1st Year; 2nd Year; 3rd Year; more than 3 Years, how many _____

Will , Will Not , attend Thursday evening banquet; special meal requests _____

Five Day Training Program	Two Day Maintenance Program
Before April 30th, 2022.....\$485	Before April 30th, 2022.....\$285
April 30th and Later\$525	April 30th and Later.....\$325
Banquet Guest \$40	

Register Online and Pay at: www.ohioapt.org
(click on Training, then Finance Officers Training)

Public Finance Officers Training Institute – June 13–17, 2022
Maintenance Program June 16–17, 2022
Kalahari Resort & Conference Center
CPIM, FIA, CPE, CPFA, ACPFA and CLE's Available

Agenda

- ❖ Practical controls for securing digital financial systems & Risk Management; Nick Artman, President, Addo Solutions and John Grillo, Producer, SeibertKeck Insurance Partners
- ❖ Capital Financing Update 2022; Mike Sudsina, Michael Prcela, Greg Van Wagnen, and Mike Spafford with Sudsina & Associates
- ❖ Financial Reporting; Chad Welty, Principal, and Mindee Johnson, Senior Manager with Rea & Associates
- ❖ State Laws and Regulations – Alphabet Soup; Rebecca Princehorn, Robert McCarthy and Tess Tannehill, Partners at Bricker & Eckler LLP
- ❖ Governmental Financial Reporting; Alyssa Kerker, Professor, Franciscan University of Steubenville
- ❖ HR Best Practices; Andrew Esposito, Mgr. Client Dev., and Amanda Riess, Account Mgr. with Clemans, Nelson and Assoc.
- ❖ Hot Topics in Human Resources; Andrew Esposito, Mgr. Client Dev., and Amanda Riess, Account Mgr. with Clemans, Nelson and Assoc.
- ❖ Treasury Management Solutions and Fraud Prevention; Jarrod Long, CTP, SVP and Chris Anzevino, VP with Westfield Bank
- ❖ Revenue Collections - maintaining a successful collection program; Sara Costanzo, Shareholder/Attorney, Weltman, Weinberg & Reis, Co., LPA
- ❖ Funds, Fund Transfers, Restrictions on Expenditures; Certificates and Disposal of Public Property; Mark Altier, Legal Counsel, Governmental Agencies
- ❖ The Ohio Ethics Law: Just the Facts (of Jaw-Dropping Investigations); Susan Willeke, Ohio Ethics Commission, Training & Communications Manager
- ❖ Navigating Fiscal Recovery Funds and the Uniform Guidance; Stacie Massey, Senior Financial Manager, Ohio Office of Budget and Management
- ❖ Investment Update and Current Trends; Jason Click, Pres. of Public Funds, Eileen Stanic, Sr. Public Funds Advisor, Meeder Investment Management
- ❖ 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
- ❖ Reserve Balance Accounts (ORC 5705.13) and the County Budget Commission; Chuck Walder, Geauga County Auditor and Alex Zumbar, Stark County Treasurer
- ❖ Communication and PR Skills you MUST have in Today's World; Tom Speaks, The Impact Group
- ❖ Real World Case Studies: Investing and Portfolio Management; Jason Click, Pres. of Public Funds, Eileen Stanic, Sr. Public Funds Advisor, Meeder Investment Management

Earn up to 32 CPIM, 32 FIA, 38.4 CPE, 17 CPFA, 7 ACPFA and 22 CLE's by Attending

CPFA

(Certified Public Finance Administrator)

EDUCATION POINTS

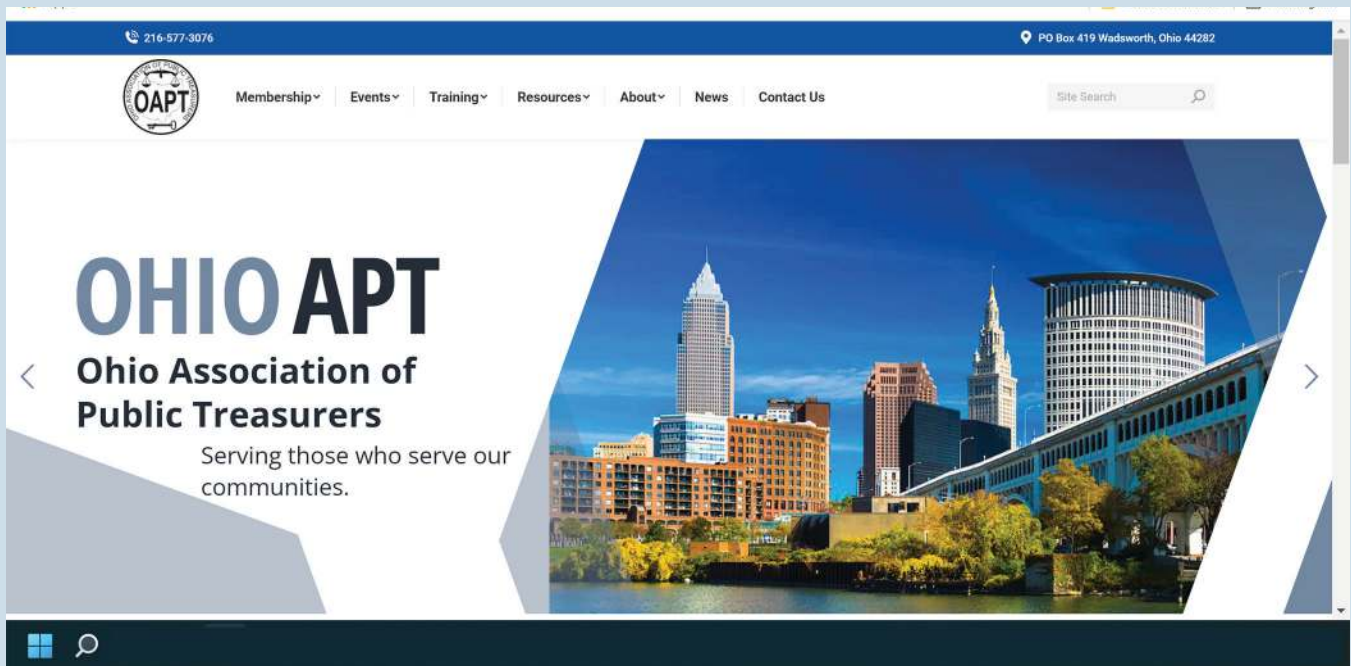
Dublin 2021	Ohio Conference	7	Canton 2015	Ohio Conference	7
Put-in-Bay 2019	Ohio Conference	6.5	Bellville 2015	Hot Topic	2.75
Bellville 2019	Hot Topic	2.5	Geneva 2015	Ohio Conference	6
Cleveland 2018	Ohio Conference	7	Bellville 2014	Hot Topic	2.5
Bellville 2018	Hot Topic	2.63	Put in Bay 2013	Ohio Conference	6.75
Maumee 2017	Conference	7	Bellville 2013	Hot Topic	1
Bellville 2017	Hot Topic	2.5	Dayton2012	Ohio Conference	4.75
Salt Fork 2016	Ohio Conference	7	Bellville 2012	Hot Topic	1
Bellville 2016	Hot Topic	2	Put in Bay 2011	Ohio Conference	9.54

EXPERIENCE POINTS

All Ohio Association of Public Treasurers Conferences are worth 2 experience points each. These points are in addition to the education points above.

Ohio APT Website www.ohioapt.org

The Ohio Association of Public Treasurers' website contains Conference, Finance Training, Hot Topic, Job Postings and special treasury articles and upcoming events. Check it out today!



OAPT Mission Statement

The Ohio Association of Public Treasurers (OAPT) was established to promote the general and professional interest of the public finance officers in their respective entities, to obtain a higher level of efficiency, through education to improve service with allied institutions and to inspire friendly and fraternal relationships among our members.

Membership Renewal Notice 2022

Online: www.ohioapt.org/membership/

Public Entity _____

Member Name _____

Title _____

Address _____

City _____ Zip Code _____

Phone _____

E-Mail Address _____

ANNUAL MEMBERSHIP DUES

_____ Membership for Public Fiscal Officer **\$ 50.00**

_____ Associate Member **\$125.00**

_____ Check if you are an OAPT Workers Compensation Group Member, if so, your membership fee is included in your Group fee, simply complete the member information above and return it to the address below, no payment is required.

FEDERAL TAX I.D. #23-7367195

Please return a copy of statement with your remittance.
Make Checks Payable to "Ohio Association of Public Treasurers"
Please return a separate copy for each member.

P.O. Box 419
Wadsworth, Ohio 44282

Membership Registration Online at www.ohioapt.org/membership/

Payment Option Also Available Online

OHIO ASSOCIATION OF PUBLIC TREASURERS

Hot Topic Seminar – April 29, 2022

Sponsored by:



This Hot Topic Seminar is packed with information to assist public finance officers in the performance of their duties. We are planning a full day of training and updates, including an ARPA and Legislative update from Bricker & Eckler, Workers Compensation Pool update by Sedgwick, Cyber security session by Huntington Bank and a panel of experts, HR update on how to navigate Hybrid workplaces and the changing workspace by Frost Brown and Todd, and a presentation from R.I.T.A. on how new employee work situations and schedules (fully remote, fully in-office, and hybrid) will impact the collection of municipal income tax. **CPE, CPFA, CPIM and FIA** credits have all been submitted and are pending approval.

OAPT Partners:

Scott Weisend, Director of Sales & Operations, Sedgwick
William Matejka, Buckeye Deferred Comp

Agenda:

8:30 a.m. – 9:00 a.m.	Continental Breakfast & Registration
9:00 a.m. – 10:00 a.m.	State Legislative Update & the APRA's Final Rule – Jeffrey D. Harris, Of Counsel, Bricker & Eckler; hear an update on the goings-on with the General Assembly and an overview of some creative uses of ARPA funds.
10:00 a.m. – 10:30 a.m.	OAPT Group Programs Update/Ohio BWC Update – Scott Weisend, Director of Sales and Operations, Sedgwick.
10:30 a.m. – 12:00 p.m.	Protecting Yourself in Today's Cyber Landscape – Michelle Tucker, Vice President, Huntington Security; Kim Perez, Treasurer City of Canton, Ashley Bauer, Huntington Insurance and Product Manager, FBI Representative, SPARCC Representative, Tony Okray, Huntington Bank Government Bank Relationship Manager; hear about current cybersecurity threats and review best practices and how to reduce risk of cyber fraud.
12:45 p.m. – 1:00 p.m.	OAPT Deferred Comp update, William Matejka.
1:00 p.m. – 2:00 p.m.	From Home to Work and Back Again – Navigating a Changing Workspace Catherine Burgett, Frost Brown Todd LLC; learn how to navigate the unexpected pitfalls of a hybrid workforce.
2:00 p.m. – 3:00 p.m.	Ohio Municipal Income Tax in New Work Environments Amy Arrighi, Regional Income Tax Agency; hear how new employee work situations and schedules (fully remote, fully in-office, and hybrid) will impact the collection of muni income tax, and more.

Speaker Biographies

Jeffrey Harris' career spans more than two decades in Ohio's economic development, largely from within government and now at Bricker. One of the firm's public finance attorneys, Jeffrey's practice includes serving as counsel to local economic developers, and, since the onset of COVID-19, guiding public sector clients in deploying federal and state stimulus funds. At the state, county and city levels, Jeffrey held various attorney and non-attorney public service roles. He began his career at the Ohio Department of Development (ODOD), where he spent 10 years managing the State's economic development grant portfolio, its job-creation tax incentives, and its state oversight of local property tax abatements. Jeffrey left state service after holding the title of the agency's interim CFO. Jeffrey then served as the economic development manager and assistant law director for the City of Worthington. Immediately prior to joining the Bricker team, Jeffrey was the chief executive officer of the Area Development Foundation (Knox County, Ohio), a county-level nonprofit economic development organization; in this role, he also served as general counsel for the county land bank.

Scott Weisend, Director of Sales Operations. Scott has been with Sedgwick for 10 years. Prior to joining Sedgwick, Scott worked for 22 years with Frank Gates Service Company in a variety of roles including Assistant Vice President, State Fund and also Assistant Vice President, Self Insurance. Scott has also been Managing Director of Workers' Comp Services for the Ohio Manufacturers Association and Vice President at Exam Works over Ohio and West Virginia. In addition to his 35 year career in Ohio and National Workers' Compensation, Scott has a bachelor's degree from Ohio Dominican University in Criminal Justice.

Michelle Tucker, Security Outreach Manager for Huntington Bank, Michelle has worked in numerous capacities in Information Security, Cybersecurity, and Risk Management for over 15 years. She is an accomplished technology leader, advocate for women in technology/cybersecurity, mentor, and security evangelist. In addition, Michelle is active in the cybersecurity community, serving on several advisory & non-profit boards within the community.

Tony Okray (CTP), currently serves as Senior Vice President Government Banking Relationship Manger for Huntington Bank in the

Hot Topic Seminar Registration Form

Name _____ Title _____

Public Entity _____

Address _____

City _____ State _____ Zip Code _____

Email _____

Additional Attendee _____

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

Please Make Checks Payable to:

Ohio Association of Public Treasurers, Mail To: P.O. Box 419, Wadsworth, Ohio 44282

OR [Register online](http://www.OhioAPT.org), and if you like, pay online at www.OhioAPT.org
at the top of our Home page click [Training](#) then select [Hot Topic Seminar](#)



Between Cleveland & Columbus



Exit 720 State Route 97 West
Bellville, Ohio 44813
419-886-7070



Summit, Stark, Portage, Medina, Wayne, Ashland and Richland County Ohio markets. He provides day-to-day direct support for government clients within his assigned areas. Previously he had worked for FirstMerit bank as Vice President -Team Leader in the Treasury Management Department. Tony joined FirstMerit in 1999 after a combined seven years in retail and commercial banking with Star, FirstStar, and US Bank. Tony has over 35 years of banking experience and also holds his CTP certification and is active in the Association For Financial Professionals (AFP).

Tony is also very active in volunteer activities, including Jr. Achievement, local clubs and boards and has dedicated numerous hours to youth coaching in Baseball, Basketball, Softball and Soccer. Tony currently lives in North Canton Ohio with his wife and is father to three children.

Ashley Bauer, Vice President Insurance Product Manager, Commercial Lines Ashley began her insurance career in at Arthur J. Gallagher & Company as an account executive and later held a marketing role at Philadelphia Insurance companies. Joining the Huntington team in 2012 as a commercial lines marketing specialist, Ashley advanced to commercial marketing manager in 2014, and currently serves as the

property and casualty product manager for Huntington Insurance. Specializing in the areas of cyber liability and professional liability, she spends time educating customers about cyber risks both in individual placement discussions and cyber presentations across the Huntington footprint. Ashley earned her Bachelor of Science in Finance from Miami University in Oxford, Ohio. She also holds her Chartered Property Casualty Underwriter (CPCU), Registered Professional Liability Underwriter (RPLU), Associate in Risk Management (ARM), and Associate in Commercial Underwriting (AU) designations.

Catherine Burgett is a partner with Frost Brown Todd LLC and has been practicing in the field of Labor and Employment law for over a decade. Her professional goal is to make her clients' lives easier by working with them to develop effective strategies and solutions for all areas of the human resources function.

Amy Arrighi has served as Chief Legal Counsel for the Regional Income Tax Agency since December 2005. She oversees the Agency's efforts to bring taxpayers into filing and payment compliance; and also serves as legal advisor to the Agency's Board of Trustees, administration and management.



The Ohio Treasurer

Spring 2022

Editor: Jack C. Krise, Jr.

The Ohio Treasurer is published for its members, by the Ohio Association of Public Treasurers, a chapter of the Association of Public Treasurers of the United States & Canada.

**Ohio Chapter
Association of Public Treasurers
P.O. Box 419
Wadsworth, Ohio 44282**

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P.O. Box 419
Wadsworth, OH 44282

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CALENDAR OF EVENTS



**Ohio APT
Hot Topic Seminar**
Der Dutchman
Bellville, Ohio
April 29, 2022

CPFA Maintenance

OAPT partnering with APT US&C
Kalahari Conference Center
Sandusky, Ohio
June 16 - 17, 2022



Public Finance Officers Training

OAPT partnering with APT
US&C
Kalahari Conference Center
Sandusky, Ohio
June 13 - 17, 2022

Ohio APT 48th Annual Conference 2022

The Lodge at Geneva-on-the-Lake
Geneva-on-the-Lake,
Ohio

October 5 - 7, 2022
Special rate of \$129
per night

Rate only available through a link on our
website

