



**Ohio Association of Public Treasurers**  
**Public Finance Officers Training Program**  
**Join the Experience!**



**Ohio Public Finance**  
**Officers Training Institute**  
*2023 Program Brochure*  
*Join the Experience!*

**Institute Partners**



Association of Public Treasurers  
of the United States and Canada



**42nd Annual**  
**Public Finance Officers Training Program**  
 June 5-9, 2023

**CPFA Maintenance Program**  
 June 8-9, 2023

**Kalahari Resort & Conference Center**  
 Sandusky, Ohio



**OAPT Finance Officers Training**  
 June 5-9, 2023

**Topics**

- **Principles of Public Finance**
- **Governmental Accounting**
- **Cash Management/ Banking Relations**
- **Investing in Public Funds**
- **Debt Management**
- **Ethics and the Treasurer**
- **State Laws and Regulations**
- **Public Budgeting**
- **Technology**
- **Disaster Preparedness**
- **Personnel Management**
- **Communications and Public Relations**
- **Organizational Management**
- **State Specific Education**



**Hotel**

The room rate at the Kalahari is \$135 per night. Reservations can be made by calling 1-877-525-2427 on or before **Friday, May 5, 2023** or until our room block is sold out whichever is sooner. Please ask for the **Public Finance Training by OAPT** Room Block. All rooms at the Kalahari come with complimentary water park passes (four per standard room). Parking is free.

**Conference Registration**

The OAPT Public Finance Officers Training Program is divided into two separate but related programs.

Whether you have not yet begun the CPFA program, have completed a portion of the program, or simply wish to maximize your educational opportunity, we offer a five-day program. We also offer a two-day maintenance program to provide part of the necessary training to re-certify your certification. Please refer to the registration form for program fees.

In addition to the program fees, there will be a cancellation fee of \$200 for the week-long program and \$100 for the two-day program after May 24, 2023.

To properly serve and accommodate participants we have a registration cut-off of May 29, 2023. Space is limited, any registrations after May 29<sup>th</sup> will be on a first come basis until the sessions are full.

**Certification Credits Available**

**Fiscal Integrity Act**

**CPIM**

**CPE**

**CPFA**

**ACPFA**

**CLE**

## About the Ohio Public Treasurers Training Program

For over four decades the Ohio Association of Public Treasurers has been sponsoring training to advance knowledge of the most current practices in the profession. Following a program developed by the Association of Public Treasurers of the United States & Canada (APT US&C), **the training is designed to provide professional development and skills training for those in local government finance in Ohio.** The three-year program is a key element in attaining the professional designation of Certified Public Finance Administrator (CPFA). The training program also provides credit towards various other professional certifications.

This program provides both skills development and content specific education. The program has two components; the five-day training curriculum for those just starting, or who are part way through the certificate training; and the two-day maintenance program for those who have a certificate, but wish to gain more current knowledge in the field of public finance and/or wish to make use of the continuing education credits available to them from the training program to maintain their various certifications.

In addition, credits toward the State Treasurer's Office CPIM program are available based on the content of the specific sessions, and continuing education credit is available for all participants.

### The Institute Sponsor: The Ohio Association of Public Treasurers

The Ohio Association of Public Treasurers (OAPT) was established to promote the general and professional interest of the public fiscal officers and treasurers in their respective communities, to obtain a higher level of efficiency, to improve service with allied institutions and to inspire friendly and fraternal relationships among our members. This program is one of many educational opportunities offered by the OAPT.

This year we expect to have another great program with the assistance of our partners, *the APT US&C*, and *Franciscan University (OH)*, who share the same commitment as the OAPT to provide public finance officers with a valuable learning experience in a friendly atmosphere.

Today the OAPT has over 600 members representing communities from all over the State of Ohio and over 100 associate members. For over four decades we have been offering our members, and other public finance professionals, training and career development.

### The Certification Programs

**CPFA**—To be eligible for this prestigious designation, an individual must be the elected or appointed treasurer, deputy or assistant treasurer, employee in/or dealing with the office of the treasurer or principal officer in the governmental entity who is charged with the performance or supervision of investments, debt and/or treasury activities. The APT US&C certification requires 100 hours of training pursuant to their curriculum. There are other requirements related to education and experience before the certificate is awarded. This training program is one step, but certainly a major step along the path towards earning your CPFA designation. Twenty-four months of membership in the APT US&C national association is also required.

**CPIM**—The Ohio Treasurer of State's Center for Public Investment Management (CPIM) provides Ohio public funds managers with high-quality instruction in the areas of investments and cash management, as prescribed by Ohio Revised Code section 135.22, by providing their own training and by partnering with professional organizations, like the OAPT. For more information, visit the Ohio Treasurer of State's website at: [www.tos.ohio.gov](http://www.tos.ohio.gov). The OAPT program has provided attendees with more than sufficient CPIM hours to meet the 6 hour annual requirement.

**CPE Credit**—This program qualifies for Continuing Professional Education credit for Certified Public Accountants.

### Fiscal Integrity Act Training Requirements

Requires on-going training for Fiscal Officers in Ohio. For more information, visit the Ohio Auditor of State's website at: [www.ohioauditor.gov](http://www.ohioauditor.gov). This program qualifies for FIA required hours.

**CLE**—Continuing Legal Education for Attorneys.

### Special Events and Features of the Program

On Wednesday afternoon we will coordinate a social and networking outing to one of the many points of interest in the Sandusky Lakefront area.

The program includes breakfast daily, lunch on M, T, & TH, coffee/snack breaks, and there will be a banquet for all participants on Thursday evening.

Attire is Casual or Business casual, including the banquet. Also, bring a sweater for the air conditioned conference center.

**Scholarships** applications are available on our website at [www.ohioapt.org](http://www.ohioapt.org) and click on the Events & Training tab, then Finance Officer Training.

### Join the Experience—Register Today!

#### Program Contacts:

**Sal Talarico, Executive Director**

[OAPTEducation@gmail.com](mailto:OAPTEducation@gmail.com)

**Terri Meek, Asst. Executive Director**



### Registration

**On-line registration is the preferred method, go to: [www.ohioapt.org](http://www.ohioapt.org) and click on the Events & Training tab, then Finance Officer Training to register and generate an invoice to submit with your payment. You can pay by check with your invoice or pay online with a credit card. You can also use this registration form.**

Five-day Training Program  
Before April 30, 2023 \_\_\_\_\_ \$549  
April 30<sup>th</sup> or later \_\_\_\_\_ \$599

Two-day Maintenance Program  
before April 30, 2023 \_\_\_\_\_ \$329  
April 30<sup>th</sup> or later \_\_\_\_\_ \$359

Banquet Guest \_\_\_\_\_ \$60

#### Make Check Payable to (NEW ADDRESS):

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

### Registration Information

\_\_\_\_\_  
Name and Title

\_\_\_\_\_  
Public Entity

\_\_\_\_\_  
Address

\_\_\_\_\_  
Telephone number

\_\_\_\_\_  
E-mail address

#### Other Information

This is my \_\_\_ 1st \_\_\_ 2nd OR \_\_\_ 3rd Year  
\_\_\_ Other (How many years? \_\_\_)

Meals \_\_\_ Dietary restrictions? Please list  
here: \_\_\_\_\_

\_\_\_ I do \_\_\_ do not plan to attend the Thursday  
evening banquet.