



**Ohio Association of Public Treasurers
Public Finance Officers Training Institute - June 5-9, 2023
Maintenance Program June 8-9, 2023
Kalahari Resort & Conference Center**



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Class # of
Hours

CPE's, CPIM's, CPFA, ACPFA and CLE's are ALL APPROVED; FIA's are pending with the AOS

Sunday, June 4th Hotel Check-in

Monday, June 5, 2023

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

2.0 2.0 2.4 2.0

1 2 8:00-10:00 am From Paper to Automation: The Past, Present, and Future of Payment Technologies
Bill Burke, Implementation Analyst, Software Solutions Inc.

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

2.0 2.0 2.4

2 2 10:15-12:15 pm Budgeting Basics
Lee Shortland, CPA, Director of Finance Director - City of Westerville

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

2.0 2.0 2.4 2.0

3 2 1:15-3:15 pm Local Government Records: Retention, Disposition, and Electronic Records Considerations
Pari Swift, MLIS, CRM, University Records Manager, The Ohio State University

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

1.0 1.0 1.2

4 1 3:30-4:30 pm Fundamentals of Investing
Eileen Stanic, Regional Dir Advisory Services, Meeder Investment Management

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

Tuesday, June 6, 2023

7:30-8 am **Breakfast**

2.0 2.0 2.4

5 2 8-10 am Expanding Grant Capacity: Keys to Effective Financial Grants Management
Stacie Massey, Senior Financial Manager, Ohio Office of Budget and Management

10-10:15 am **Break**

2.0 2.0 2.4 2.0

6 2 10:15-12:15 pm Debt Issuance/Capital Planning and the Star Trek (Kobayashi Maru).
Matt Stuczynski and Bill Logan, MAS Financial Advisory Services

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

2.0 2.4 2.0

7 2 1:15-3:15 pm Having Employees in 2023
Catherine Burgett, Attorney at Law, Partner, Frost Brown Todd LLP

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

1.0 1.0 1.2 1.0

8 1 3:30-4:30 pm Fiscal Officer Transition - Certificate of Transition
Tim Downing, Quality Assurance Tech Specialist Lead, AOS office

1.0 1.0 1.2 1.0

9 1 4:30-5:30 pm Confessions of Fraudsters
Marissa Gibson, Investigator and Jessica Benson, Forensic Audit Manager, Auditor of State's Office

Wednesday, June 7, 2023

7:30-8 am **Breakfast**

2.0 2.0 2.4 2.0

10 2 8-10:00 am Communications and Public Relations
Sara Costanzo, Shareholder/Attorney, Weltman, Weinberg & Reis, Co., LPA

10-10:15 am **Break**

2.0 2.0 2.4 2.0

11 2 10:15-12:15 pm Lead Like an Emperor: Leading Through Challenges and Overcoming Adversity
Tom Speaks, Partner and Co-founder, The Impact Group

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



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Thursday, June 8, 2023

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

2.0	2.0	2.0	2.4	2.0
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12 2 8-10 am Enhancing cybersecurity controls for local government financial, accounting, and human resources
Frank Antenucci, Chief Deputy Administrator for IT Services, Geauga County Auditor's Office

10-10:15 am **Break**

2.0	2.0	2.0	2.4	2.0
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13 2 10:15-12:15 pm Public Finance
Rebecca Princehorn, Paul Rutter, Catherine Swartz, Partners at Bricker Graydon

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

1.0	1.0	1.2
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14 1 1:15-2:15 pm Investments - Finding Certainty during Uncertain Times
Eileen Stanic, Regional Dir Advisory Services, Scott Gruber, Dir Advisory Serv. Meeder Investment Mgmt

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

2.0	2.0	2.4	2.0
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15 2 2:30-4:30 pm It's Banking KAHOOT!
Huntington Bank, Maureen Shildwachter, Senior Vice President; Steve Broerman, Huntington Bank
Chase Bank, Joe Farris, VP Government Banking

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

Friday, June 9, 2023

7:30-8:30 am **Breakfast**
8:15-8:30 am **OAPT Workers Compensation Group Update, Scott Weisend, Sedgwick/CompManagement, Inc.**

2.0	2.0	2.0	2.4	2.0
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16 2 8:30-10:30 am The Ohio Ethics Law 2023: To Be or Not to Be (Ethical)!
Susan Willeke, Ohio Ethics Commission, Training & Communications Manager

10:30-10:45 am **Break**

2.0	2.4	2.0
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17 2 10:45 am - 1:00 pm Creating an Organizational Culture by Developing Personnel Management Skills to Bridge Diversity,
Generational Considerations, and Burnout through these Uncertain Times.
Amanda Riess, Account Mgr., Kelly Babcock, Dir. of Training with Clemans, Nelson and Assoc.

11:45 am - 12:00 pm **Break - Pick up boxed lunch for working lunch**

30 Total Hours

6.0	26.0	30.0	36.0	24.0
6.0	9.0	11.0	13.2	10.0

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F	M			
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Training Institute End - Drive Safely

**Monday through Friday Program = 16 CPFA Points ^
Thursday and Friday Only = 5.5 CPFA Points ***

* If you have already received your CPFA = 6 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 2023 is year 3 - participants can start anywhere in the 3 year cycle

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