



**Ohio Association of Public Treasurers
Public Finance Officers Training Institute - June 3-7, 2024
Maintenance Program June 6-7, 2024
Kalahari Resort & Conference Center
*CPIM, FIA, CPE, CPFA, ACPFA and CLE's***

Agenda

- Managing Electronic Records of Local Governments, Pari Swift, MLIS, University Records Manager, The Ohio State University
- Internal Controls, Richard Cunningham, Quality Assurance & Technical Specialist, AOS, and Fraud Red Flags, Todd Clark, Fraud Investigator, Jessica Benson, Forensic Audit Manager, AOS
- Cash Management trends best practices, Caroline Bove, First Financial Bank and Brandon Parker, EVP of i3 Vertical's ERP
- Organizational Management, Jim O'Leary, attorney
- Financial Reporting and Grants Management, Stacie Massey, Ohio Office of Budget and Management.
- Municipal Financing Overview, Bradley Payne, Andrew Brossart, Heather Arling, Dan Schall, & Brenda Wehmer.
- Personnel Management, Amanda Reiss, Clemans Nelson
- Both sides of the Balance Sheet, Tony Okray, Abby King, Connor Chambers, Huntington Bank
- Treasury Truths and Market Myths, and Real World Case Studies, Eileen Stanic, Regional Director Advisory Services, Jim McCourt, Director, Advisory Services, Gabe Phillips, Advisory Services Consultant, Meeder Public Funds, Inc.
- Revenue Collections, Sara Costanzo, Shareholder/Attorney, Weltman, Weinberg & Reis, Co. LPA
- Principles of Public Finance, Sudsina & Assoc.
- The Ohio Ethics Law 2024: 50 Years of Promoting Governmental Ethics, Susan Willeke, Ohio Ethics Commission, Training & Communications Manager
- Disaster Prep Regarding Banking Services, Shantel Laird, AVP/Cash Management, Croghan Colonial Bank.
- Building, Promoting and Protecting Your Brand, Tom Speaks, Partner and Co-founder, The Impact Group
- Information Technology, Trent Corbin, SSI
- Principles of Public Finance and Housing, Bricker & Graydon, LLP

**We will be applying for various credits including 32 CPIM, 32 FIA,
38.4 CPE, 17 CPFA, 4 ACPFA and 28 CLE's**