



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

**Ohio Public Finance
Officers Training Institute
2025 Program Brochure
Join the Experience!**

Institute Partner



Association of Public Treasurers
of the United States and Canada

**44th Annual
Public Finance Officers Training Program
June 2-6, 2025**

**CPFA Maintenance Program
June 5-6, 2025**

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



**OAPT Finance Officers Training
June 2-6, 2025**

Topics

- › **Governmental Accounting**
- › **Cash Management/ Banking Relations**
- › **Investing in Public Funds**
- › **Debt Management**
- › **Internal Controls/ Fraud Detection**
- › **Ethics and the Treasurer**
- › **Financial Reporting**
- › **Revenue Collections**
- › **Communications and Public Relations**
- › **Organizational Management**



Hotel

The room rate at the Kalahari is \$144 per night. Reservations can be made by calling 1-877-525-2427 on or before **Friday, May 2, 2025** or until our room block is sold out whichever is sooner. Please ask for the **Public Finance Training by OAPT Room Block OR use the convenient reservation link on our website.** 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 21, 2025.

To properly serve and accommodate participants we have a registration cut-off of May 27, 2025. Space is limited, any registrations after May 27th will be on a first come basis until the sessions are full.

Certification Credits Available

Fiscal Integrity Act

CPIM

CPE

CPFA

ACPPA

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, who are part way through the certificate training, or are looking for in-depth fiscal officer 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 partner, *the APT US&C*, sharing 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, fiscal officer or principal officer in the governmental entity who is charged with the performance or supervision of investments, debt, treasury or financial 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. 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. Our 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 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

Terri Meek, Asst. Executive Director



Registration

On-line registration is the preferred method, go to: 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, 2025 _____ \$579
April 30th or later _____ \$629

Two-day Maintenance Program
before April 30, 2025 _____ \$349
April 30th or later _____ \$379

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.

Reminder: make your room reservation with the Kalahari using the link on our website.