



# Ohio Public Finance Officers Training Institute

2025 Program Brochure

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

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

Ditch the desk. Dive in!  
Kalahari in Sandusky, Ohio awaits!

# About the Ohio Public Treasurers Program



## Background

For over four decades the Ohio Association of Public Treasurers has been sponsoring training to advance knowledge of the most current practices in 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.



## 5-Day Training Program

The five-day program is for those just starting, who are part way through the certificate training, or are looking simply for in-depth fiscal officer training.

## 2-Day Maintenance Program

The two-day maintenance program is 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.





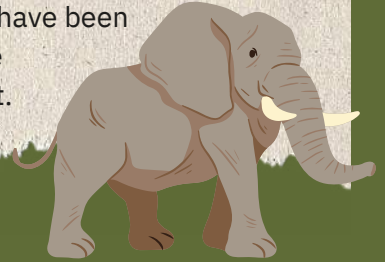
# **Training Topics**

- Governmental Accounting
- Cash Management
- Banking Relations
- Investing in Public Funds
- Debt Management
- Internal Controls
- Fraud Detection
- Ethics
- Financial Reporting
- Revenue Collections
- Communication
- Public Relations
- Organization Management

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

The Ohio Association of Public Treasurers (OAPT) was established to promote the general and professional interests 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 education opportunities offered by the OAPT.

Today the OAPT has over 800 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.



### **Scholarships**

Applications are available  
on our website at

**[www.ohioapt.org](http://www.ohioapt.org)**

Click on the Events &  
Training tab, then Finance  
Officer Training.

# The Certification Programs

## 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.

## CLE

Continuing Legal Education for Attorneys.

## CPE Credit

This program qualifies for Continuing Professional Education credit for Certified Public Accountants.

## 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 government 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 National APT US&C association is also required.

## 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). Our program qualifies for FIA required hours.





# Registration

**Online 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. You can 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 below** and mail it to the OAPT.

## 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

Please mail registrations and make payable

Ohio Association of Public

Treasurers

P.O. Box 419

Wadsworth, OH 44282

*Please note: there is a cancellation fee of \$200 for the 5-day program and a \$100 fee for the 2-day program after May 21, 2025.*

*We ask that registrations should be submitted by May 27, 2025 to ensure proper accommodations and guaranteed participation.*



**Scan this with your mobile device to register online!**



## Registration Information

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Name & Title

-----  
Public Entity

-----  
Address

-----  
Telephone Number

-----  
E-mail Address

## Other Information

This is my \_\_\_1st\_\_\_2nd OR\_\_\_3rd  
Year\_\_\_Other (How many years  
?\_\_\_)

Do you have any dietary  
restrictions? Please list  
here:\_\_\_\_\_

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

**Parking is Free!**

## **Hotel**

The room rate at the Kalahari is \$144 per night. Reservations can be made via the reservation link on our website or by calling 1-877-525-2427 on or before Friday, May 2, 2025 or until our room block is sold out.

All rooms at the Kalahari come with complimentary water park passes (four per standard room). Parking is free.



## **Special Events**

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

On Thursday Evening a rewards banquet will be held with dinner and refreshments.

## **Meals**

The program includes breakfast daily and coffee/snack breaks.

Lunch will be provided on Monday, Tuesday, and Thursday.

## **Program Contacts**

**Sal Talarico**  
Executive Director

**Terri Meek**  
Asst. Executive Director

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

Attire is casual or business casual for both the training and the banquet. Please bring layers as the conference center is air conditioned.

# Message from our President



OAPT Board President  
Terri Soto

This year we expect to have another great program that provides public finance officers valuable learning in a friendly atmosphere.

The OAPT looks forward to meeting you!



**OAPT has Training all year long!  
Save the Date!**

**Hot Topic Seminar**

April 25, 2025 at Der Dutchman in Bellville, OH

**Fall Conference**

October 8-10, 2025 at the Hancock Hotel in Findlay, OH

**Annual Public Finance Officer Training**

June 1-5, 2026 at the Kalahari in Sandusky, OH

**CPFA Maintenance Program**

June 4-5, 2025 at the Kalahari in Sandusky, OH



**Bring yourself! Bring your deputy! Bring  
your assistant! Bring your team!**

**The OAPT can meet all your succession  
planning and educational needs!**