



**Ohio Association of Public Treasurers
Public Finance Officers Training Institute - June 2-6, 2025
Maintenance Program June 5-6, 2025
Kalahari Resort & Conference Center**



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**Class # of
Hours**

CPE's, CPIM's, CPFA, ACPFA, CLE's and FIA are PENDING Approval

Sunday, June 1st Hotel Check-in

Monday, June 2nd

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

2.0	2.0	2.4	2.0
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1 2 8:00-10:00 am Local Government Records: Retention, Disposition, and Electronic Records Considerations
Pari Swift, MLIS, CRM, University Records Manager, The Ohio State University

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

2.0	2.0	2.4
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2 2 10:15-12:15 pm Governmental Accounting – The Basics
Gayle York, Prof Services Specialist, SSI; Emily Foote, Fiscal Officer MidPointe Library System

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

2.0	2.0	2.4
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3 2 1:15-3:15 pm Grants...NOT Free Money
Vera Gatchell, Founder of Gatchell Grant Resources, LLC and Diell Everhart, Co-owner

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

2.0	2.0	2.4	2.0
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4 2 3:30-5:30 pm Organization Management – Conflict Resolution
James R. O'Leary, Esq., Baker & Hackenberg Co., LPA

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

Tuesday, June 3rd

7:30-8 am **Breakfast**

2.0	2.0	2.4	2.0
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5 2 8-10 am Cannabis Legalization from the Perspective of Public Sector Mgmt and HR & Union Negotiation Tips & Trends
Amanda Riess, Account Manager, Clemans, Nelson & Associates, Inc.

10-10:15 am **Break**

2.0	2.0	2.0	2.4	2.0
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6 2 10:15-12:15 pm JEDDs, ESIDs, and NCAs: Notes on Financial Onboarding, Management, and Compliance
John Flis, Attorney; Adam Seeley, Attorney - Bricker Graydon LLP

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

2.0	2.0	2.4
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7 2 1:15-3:15 pm Financial Reporting
Steve Julian, CPA, founder and Partner; Jason Cowman, Partner; Will Sengos, Senior Accountant;
Nate Heaston, Senior Accountant, Julian & Grube

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

2.0	2.0	2.4	2.0
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8 2 3:30-5:30 pm Cash Mgmt Tools, Banking Internal Controls and Conversations to have with your Financial Institutions
Shantel M. Laird / AVP, Sr. Commercial Deposit Officer

Wednesday, June 4th

7:30-8 am **Breakfast**

2.0	2.0	2.4	2.0
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9 2 8-10:00 am Revenue Collections
Sara Costanzo, Shareholder/Attorney, Weltman, Weinberg & Reis, Co., LPA

10-10:15 am **Break**

2.0	2.0	2.4	2.0
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10 2 10:15-12:15 pm Internal Controls and Fraud Detection
Derek Conrad CPA, CFE – Principal, Government Services, REA

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



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Thursday, June 5th

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

2.0	2.0	2.4
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11 2 8-10 am Capital Markets Update and Financing Overview
Mike Sudsina, Michael Prcela and Greg Van Wagnen, Sudsina & Associates, LLC

10-10:15 am **Break**

2.0	2.0	2.0	2.4
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12 2 10:15-12:15 pm Navigating Public Funds Investments: Key Terms, Liquidity Costs, Market Timing Risks; and Performance Measurement AND A "Wicked" View of Investing Public Funds
Eileen Stanic, CTP, Regional Director, Advisory Services; Jim McCourt, CFA, Director, Advisory Services; Gabe Phillips, Director Advisory Services, Meeder Public Funds, Inc.

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

2.0	2.0	2.4	2.0
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13 2 1:15-3:15 pm The Ohio Ethics Law: Promoting Ethics, Protecting the Public
Susan Willeke, Ohio Ethics Commission, Training & Communications Manager

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

2.0	2.0	2.4	2.0
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14 2 3:30-5:30 pm Merchant and Escrow Services with a bit of Account Analysis 101
Stephen Broerman, VP, Treasury Management Advisor; Ryan Coughlin, SVP, Managing Dir National Deposits Group; Eli Stratton, VP, Merchant Services Solutions Consultant; Maureen Shildwachter, SVP, Government Banking Relationship Manager

6-6:30 pm **Reception**
6:30-8:30 pm **Awards Banquet**

Friday, June 6th

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	2.4	2.0
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15 2 8:30-10:30 am How to Effectively Communicate
Tom Speaks, Partner and Co-Founder, The Impact Group

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

2.0	2.0	2.4	2.0
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16 2 10:45 am - 1:00 pm The County Budget Commission – Overview, Understanding, and Preparedness
Chuck Walder, Geauga County Auditor

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

32 Total Hours

4.0	32.0	32.0	38.4	22.0
2.0	12.0	12.0	14.4	8.0

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Training Institute End - Drive Safely

**Monday through Friday Program = 17 CPFA Points ^
Thursday and Friday Only = 6 CPFA Points ***

* If you have already received your CPFA = 2 ACPFA & 5 CPFA

^ 3-year Program Provides a Total of 50 CPFA Points - CPFA hours are based on total hours + 2 hours for Peer Knowledge .
2025 is year 2 - participants can start anywhere in the 3 year cycle

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