



**Ohio Association of Public Treasurers
Public Finance Officers Training Institute - June 3-7, 2024
Maintenance Program June 6-7, 2024
Kalahari Resort & Conference Center**



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Class # of
Hours

CPE's, CPIM's, CPFA, ACPFA and CLE's are ALL APPROVED - FIA is PENDING Approval

Sunday, June 2nd Hotel Check-in

Monday, June 3, 2024

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

2.0 2.0 2.0 2.4 2.0

1 2 8:00-10:00 am Managing Electronic Records of Local Governments
Pari Swift, MLIS, CRM, University Records Manager, The Ohio State University

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

2.0 2.0 2.4 2.0

2a 2 10:15-12:15 pm Internal Controls
Richard Cunningham, Quality Assurance & Technical Specialist, AOS office
2b Fraud Red Flags
Todd Clark, Fraud Investigator; Jessica Benson, Forensic Audit Manager, AOS Office

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

2.0 2.0 2.4

3 2 1:15-3:15 pm Cash Management trends best practices
Caroline Bove, VP of Public Finance, First Financial; Brandon Parker, EVP of ERP

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

2.0 2.0 2.4 2.0

4 2 3:30-5:30 pm Organizational Management - How to get it all done?
James R. O'Leary, Esq., Baker & Hackenberg Co., LPA

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

Tuesday, June 4, 2024

7:30-8 am **Breakfast**

2.0 2.0 2.0 2.4 2.0

5 2 8-10 am Federal Grant Updates & Financial Reporting: Maximizing Impact with Transparency
Stacie Massey, MBA, CGFM, Deputy Director, Grants & Financial Reporting, Ohio Office of Budg & Mgmt

10-10:15 am **Break**

2.0 2.0 2.4 2.0

6 2 10:15-12:15 pm Municipal Financing Overview, Interactive Capital Planning Strategies and Innovative Financing Options
Bradley Payne, Andrew Brossart, Partner, Heather Arling, Director, Dan Schall, Director
Dinsmore & Schol, Brenda Wehmer, Partner

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

2.0 2.0 2.4 2.0

7 2 1:15-3:15 pm Empowering Autonomy: Tools for Building Self-Sufficient Departments
Trent Corbin, Solutions Engineer, Software Solutions, Inc.

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

2.0 2.0 2.4 2.0

8 2 3:30-5:30 pm What a Disaster! Crisis Communications and Maintaining an Organization's Culture
Amanda Riess, Account Manager, Clemans Nelson & Associates, Inc.

Wednesday, June 5, 2024

7:30-8 am **Breakfast**

2.0 2.0 2.4 2.0

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 2.0 2.4 2.0

10 2 10:15-12:15 pm Disaster Recovery
Carla Waggoner, SVP/COO; Jacob Molyet, Information Systems Manager; Melissa Walker,
VP/Retail Operations and Security; Shantel Laird, AVP/Senior Commercial Deposit Officer

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



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Thursday, June 6, 2024

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

2.0	2.0	2.4	2.0
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11 2

8-10 am

Capital Financing and Debt Capacity Overview 2024
Mike Sudsina, Michael Prcela and Greg Van Wagnen, Sudsina & Associates, LLC

10-10:15 am **Break**

2.0	2.0	2.4	2.0
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12 2

10:15-12:15 pm

The Ohio Ethics Law 2024: 50 Years of Promoting Governmental Ethics
Susan Willeke, Ohio Ethics Commission, Training & Communications Manager

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

2.0	2.0	2.4
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13 2

1:15-3:15 pm

Treasury Truths and Market Myths & Real World Case Studies
Eileen Stanic, CTP, Regional Director, Advisory Services; Jim McCourt, CFA, Director, Advisory Services; Gabe Phillips, Advisory Services Consultant, Meeder Public Funds, Inc.

3:15-3:30 pm **Gabe Phillips, Advisory Services Consultant**

2.0	2.0	2.0	2.4	2.0
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3:30-5:30 pm

Both Sides of the Balance Sheet
Tony Okray, Abby King, Connor Chambers, Jill Murphy, Huntington Bank

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

Friday, June 7, 2024

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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8:30-10:30 am

Building, Promoting and Protecting Your Brand
Tom Speaks, Partner and Co-Founder, The Impact Group

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

2.0	2.0	2.0	2.4	2.0
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16 2

10:45 am - 1:00 pm

Principles of Public Finance & Housing
Catherine Swartz, Jacquelin Lewis, and Julia Konieczny, Bricker Graydon LLP

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

32 Total Hours

10.0	32.0	32.0	38.4	28.0
4.0	12.0	12.0	14.4	10.0

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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 = 4 ACPFA & 4 CPFA

^ 3-year Program Provides a Total of 50 CPFA Points - CPFA hours are based on total hours + 2 hours for Peer Knowledge 2024 is year 1 - participants can start anywhere in the 3 year cycle

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