

CERTIFIED PUBLIC FUNDS INVESTMENT MANAGER



The Association of Public Treasurers of the United States and Canada offers the Certified Public Funds Investment Manager (CPFIM) and Advanced CPFIM certifications as national credentials for treasury professionals who distinguish themselves by achieving educational excellence in the management of public funds investing.

The CPFIM and ACPFIM certification training is designed to provide the confidence and knowledge to manage an organization's investments efficiently and effectively.

Both credentials are a five year designation and must be renewed through continuing education and experience; see APTUSC.org for recertification requirements.

The Importance of National Certification

The CPFIM and ACPFIM certifications are designed to enhance your knowledge, broaden your network, and strengthen your career. Regardless of the size of an organization or its investment portfolio, earning the CPFIM and/or the ACPFIM will help finance and treasury professionals work more skillfully with their banker, broker, colleagues and customers.

Earning one or both of these national certifications will demonstrate to your employer and community a high level of commitment to expanding investment portfolio management skills and dedication to continuous improvement.



Curriculum

CPFIM training provides instruction on six basic modules: 1) investment instruments; 2) banks, brokers, and advisors; 3) governance and investment policy; 4) safety, liquidity, and yield; 5) cash flow; and 6) strategy. These modules provide a great foundation for understanding investing public funds. This six hour program requires a written exam to demonstrate material retention and comprehension.

After earning the CPFIM credential, the ACPFIM provides further instruction on investment analysis, strategy, and how attendees can apply lessons to their own organization. This four hour program also requires a written exam.

Instruction time may be applicable to CPE, CPFA, and ACPFA credits. See your state requirements for CPE credits or the CPFA/ACPFA applications for details.

About Our Partner

Greg Prost has over 30 years of experience directing fixed income strategy and managing institutional portfolios. He works closely with public institutions throughout the country on fixed income solutions for operating funds, bond proceeds, and retirement accounts.



Greg is a highly respected speaker to municipal organizations in the Midwest and is a member of APT US&C, Michigan Municipal Treasurers Association, Michigan Government Finance Officers Association and Michigan Association of County Treasurers. He is also an investment management trainer for the Michigan Treasurers Institute.

Greg holds an MBA from Western Michigan University, as well as a BA in Economics from Kalamazoo College. He is a CFA Charterholder and member of the CFA Society of Detroit.