

Certified Public Finance Administrator

Application for Certification

GENERAL ELIGIBILITY

Each applicant for CPFA certification must meet the following general eligibility standards:

1. Applicant must be a duly elected or appointed treasurer, deputy or assistant treasurer, employee in/or dealing with the office of treasurer, or other principal officer in the public entity who is charged with the performance or supervision of one or more of the following responsibilities: investments, debt or treasury activities.
2. Applicant must have been an Active Member (see APT US&C's Bylaws for definition):
 - a. for at least twenty-four months immediately before applying for certification; and
 - b. at the time of approval.
3. Applicant must believe in and practice APT US&C's Code of Ethics (as adopted).
4. Applicant must have earned a combined total of 100 experience and education points. A minimum of 40 points must be earned in either education or experience with a maximum of 60 points in the remaining category. Certification expires every five years and must be renewed prior to expiration.

APPLICATION

A non-refundable fee of two hundred dollars (\$200.00) in US funds shall accompany the CPFA application. The application fee will be waived for the second submission if the first attempt at certification is unsuccessful. The fee includes application processing, certification plaque, pin, picture and press release.

Forward the fee along with CB9 copy of the typewritten or electronically-completed APPLICATION and all required documentation to

CPFA Certification Committee
APT US&C
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Oak Creek, WI 53154

The application deadline is June 1st and CPFA designations are formally announced at the following APT US&C Annual Conference.

APPEALS

A candidate whose application is not approved by the CPFA Certification Committee will be notified of the Committee's decision and the steps needed to receive the credential. Should the candidate disagree with the Committee's ruling and recommendation on how to earn the necessary points for certification, the candidate may appeal the Committee's decision. The appeal must be sent in writing within thirty (30) days of notification of the Committee's decision to APT US&C's headquarters. The Committee Chair, within thirty (30) days, shall reconsider the circumstances and reverse the decision or submit the appeal to the Board of Directors for final determination.

**Please direct any
general questions
to APT US&C
at (414) 908-4947.**



**ASSOCIATION OF PUBLIC TREASURERS
OF THE UNITED STATES & CANADA**

Certified Public Finance Administrator

Application for Certification

Name _____
Last First Middle Initial

Title _____

Employer _____

Address _____
Please include both mailing and shipping addresses, if different.

City _____ State/Province _____ Zip _____

Telephone _____ Fax _____

Email Address _____

Name as you would like it displayed on plaque _____

ELIGIBILITY CERTIFICATION

- I am a treasurer, deputy or assistant treasurer, employee in/or dealing with the office of treasurer, or principal officer from a public entity charged with the performance or supervision of one or more of the following responsibilities: investments, debt or treasury activities.
- I have been an Active Member of APT US&C for twenty-four months immediately before applying for certification.
- I affirm my belief in and practice APT US&C's Code of Ethics (as adopted).
- I have enclosed the \$200.00 application fee and understand that it is not refundable.
- I understand that, if approved, my certification will expire five (5) years from the date of certification and must be renewed prior to the expiration date. To be eligible for renewal, I must have (1) maintained continuous "Active" or "Associate" membership in APT US&C for each of the five years since certification (includes payment of annual APT US&C membership dues) and (2) earned the required points in any combination of Experience and Education Maintenance Standards.

I hereby certify that I have read the items listed above and comply with all those items. I also grant permission to APT US&C to verify the accuracy of all statements and enclosures.

Signature _____

Date _____



ASSOCIATION OF PUBLIC TREASURERS
OF THE UNITED STATES & CANADA

EXPERIENCE STANDARDS

Work Experience: (within the past 15 years for a maximum of 40 points, no duplicate credit for dual positions)	points	maximum allowed
• experience as a public treasurer as defined in the General Eligibility section	4 per year	40
• administrative, supervisory or managerial experience in government before treasury work	2 per year	20
• administrative, supervisory or managerial experience before treasury work	1 per year	10
TOTAL Work Experience		40
Other Experience:		
• attendance at an annual conference of APT US&C	5 per year	30
• attendance at a state/province APT association conference*	2 per year	12
• service as a committee member for APT US&C or a state/province APT association*	1 per yr per committee	5
• service as a committee chair for APT US&C or a state/province APT association*	2 per yr per committee	10
• service as a director or parliamentarian of APT US&C or a state/province APT association*	3 per year	15
• service as an officer of APT US&C or a state/province APT association*	4 per year	20
• service as a mentor in the APT US&C Mentor Program	1 per year	5
• receiving APT US&C's Certified Public Funds Investment Manager certification	2 for Level I 5 for Level II	7
• completion of recognized national professional achievement certification programs related to treasury management (e.g., CCM, CGFM, CPA, CPFO, CFE, CIA, CMA)	5 per certification	20
• recipient of special awards presented by APT US&C or a state/province APT association	5 per award	15
* <i>Applicants from states/provinces that do not have an APT state/province association may substitute points from ONE statewide or province-wide organization relating to treasury management.</i>		

PRESENT POSITION: (Must enclose certification of election or letter verifying election or appointment to office, including dates of service, to earn points. A Job Verification Form may be used.)

position _____ from _____ to _____ points _____

employer _____ total years _____ @ _____ per year = _____

responsibilities/job description _____

PAST POSITION(S): (Must enclose certification of election or letter verifying election or appointment to office, including dates of service, to earn points. A Job Verification Form may be used.)

position _____ from _____ to _____ points _____

employer _____ total years _____ @ _____ per year = _____

responsibilities/job description _____

(Use additional sheet(s) as necessary.)

APT US&C ANNUAL CONFERENCE OR STATE/PROVINCE CONFERENCE:

(Attach proof of attendance.)

year _____	conference site _____	points _____
year _____	conference site _____	
year _____	conference site _____	
year _____	conference site _____	
year _____	conference site _____	
year _____	conference site _____	
year _____	conference site _____	
year _____	conference site _____	
year _____	conference site _____	
year _____	conference site _____	
year _____	conference site _____	

COMMITTEE MEMBER/CHAIR OR DIRECTOR/OFFICER:

(Attach proof of service.)

year _____	position held _____	points _____
sponsoring association _____		
year _____	position held _____	
sponsoring association _____		
year _____	position held _____	
sponsoring association _____		
year _____	position held _____	
sponsoring association _____		

(Use additional sheet(s) as necessary.)

APT US&C AWARD OR STATE/PROVINCE AWARD:

(Attach proof of award.)

year _____	award name _____	points _____
awarding association _____		
conference site _____		

CERTIFIED PUBLIC FUNDS INVESTMENT MANAGER:

(Attach proof of certification.)

year _____	training site _____	level _____	points _____
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NATIONAL CERTIFICATION PROGRAM:

(Attach proof of certification.)

name of certification _____	points _____
sponsoring organization _____	
certification date _____	

TOTAL EXPERIENCE POINTS (minimum 40 points/maximum 60 points) TOTAL _____

EDUCATION STANDARDS

	maximum allowed
• Bachelor degree in public administration, accounting, finance or related field OR completion with a C grade or better of college or university courses related to treasury management (1 point per semester hour; 2/3 of a point per quarter hour)	50 points
• Associate degree in public administration, accounting, finance or related field	35 points
• Bachelor degree in an unrelated field	15 points
• Master's or Doctoral degree (5 points each)	10 points
• completion of an APT US&C public treasurers' institute (up to 50 points) AND/OR attendance at education programs pre-approved by APT US&C (assignment of points based on review of program agendas by the CPFA Certification Committee)	60 points
• treasury-related education by non-APT statewide or province-wide organizations (1 point per 4 hours of instruction)	10 points

ASSOCIATE, BACHELOR, MASTER'S OR DOCTORAL DEGREE:

(copy of transcript must be attached to earn points)

degree _____ major _____ points _____
 college/university _____
 location _____ date received _____
 (Use additional sheet(s) as needed.)

COLLEGE/UNIVERSITY COURSES RELATED TO TREASURY MANAGEMENT:

(copy of transcript must be attached to earn points)

course name and number _____ points _____
 college/university _____
 location _____
 grade _____ credit hours _____
 (Use additional sheet(s) as needed.)

PUBLIC TREASURERS' INSTITUTE OR OTHER EDUCATION PROGRAMS:

(attach proof of course completion)

sponsored by _____ points _____
 conducted by _____
 course dates _____ date of completion _____
 course dates _____ date of completion _____
 course dates _____ date of completion _____
 course dates _____ date of completion _____
 (Use additional sheet(s) as needed.)

TOTAL EDUCATION POINTS (minimum 40 points/maximum 60 points) TOTAL _____ 0

SUMMARY

TOTAL EXPERIENCE POINTS (minimum 40 points/maximum 60 points)	_____
TOTAL EDUCATION POINTS (minimum 40 points/maximum 60 points)	+ _____
TOTAL EXPERIENCE AND EDUCATION POINTS (minimum 100 points)	=====



**ASSOCIATION OF PUBLIC TREASURERS
OF THE UNITED STATES & CANADA**

JOB VERIFICATION FORM

name _____
last first middle

entity _____

title _____

dates of employment _____ to _____

duties (if not treasury; must be administrative, supervisory or managerial):

(Please check all that apply.)

- | | |
|--|--|
| <input type="checkbox"/> investment of entity cash | <input type="checkbox"/> tax collection |
| <input type="checkbox"/> cash flow forecasting | <input type="checkbox"/> banking relationship |
| <input type="checkbox"/> billing and collection of special assessments | <input type="checkbox"/> bond payments |
| <input type="checkbox"/> collection of receivables | <input type="checkbox"/> bond activity |
| <input type="checkbox"/> supervisor/manager | <input type="checkbox"/> other (specify) _____ |

signature of applicant date

signature of mayor, manager or supervisor date

signature of entity clerk (if elected) date