

## PLEASE READ ENTIRE APPLICATION BEFORE COMPLETION

*CPFA certification expires every five years. Maintaining certification is contingent upon the applicant meeting the General Eligibility, Education and Experience Maintenance Standards as outlined in this application.*

### GENERAL ELIGIBILITY

Each applicant renewing his or her CPFA certification must meet the following general eligibility standards:

1. Applicant, in each of the five years since last certification, must have been the
  - 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.
  - b. employee of an institution or organization whose operations are closely allied with or related to the functions of a treasurer's office.
2. Applicant must have maintained continuous "Active" or "Associate" (see APT US&C's Bylaws for definitions) membership with APT US&C for:
  - a. each of the five years since 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. By June 1st of the year in which certification expires, Applicant must forward to APT US&C headquarters:
  - a. the required fee in US funds.
  - b. **TWO** copies of the typewritten APPLICATION.
  - c. **TWO** copies of all required ENCLOSURES, collated *with* the application.

Note: Please DO NOT DIVIDE THE COPIES INTO "PARTS" - i.e., the APPLICATION and the ENCLOSURES. **We will forward ONE copy of your COMPLETE application package to the CPFA Certification Committee for review and verification.**

5. Applicant must have earned at total of 50 points in any combination of Education Maintenance Standards points and Experience Maintenance Standards points since last certification. Certifications must be renewed every five years. Those members with an expired CPFA credential must complete a new Application for Certification and only include points earned since the last certification.

### APPLICATION FEE

A non-refundable fee of one hundred and twenty-five dollars (\$125.00) in US funds shall accompany the Application to Maintain CPFA Certification. The application fee will be waived for the second submission if the first attempt at certification is unsuccessful. The fee includes application processing, maintenance bar, pin, picture and press release. The applicant may send in an additional \$75.00 to receive a new certification plaque instead of a maintenance bar.

### APPEALS

A candidate whose application is not approved by the CPFA Certification Committee shall 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 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.

**Direct any general questions to APT US&C headquarters at (301) 495-5560.**



## EXPERIENCE MAINTENANCE STANDARDS

	points	maximum allowed
• experience as a public treasurer as defined in the General Eligibility section of this application for the five years since last certification	4 per year	20
• completion of recognized national professional achievement certification programs related to treasury management (e.g., CCM, CGFM, CPA, CPFO, CMA)	5 per certification	20
• attendance at an annual conference of APT US&C	5 per year	25
• attendance at a state/province APT association conference*	2 per year	10
• 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 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
• recipient of special awards presented by APT US&C or a state/province APT association	5 per award	10
* 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.		

**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 \_\_\_\_\_

**OTHER POSITION(S) HELD IN THE LAST FIVE YEARS, IF APPLICABLE:**

(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.)



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

**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 _____	
year _____	conference site _____	

(Use additional sheet(s) as necessary.)

**SERVICE AS COMMITTEE MEMBER/CHAIR OR DIRECTOR/OFFICER:**

(Attach proof of service.)

year _____	position held _____	points _____
sponsoring association _____		

year _____	position held _____
sponsoring association _____	

(Use additional sheet(s) as necessary.)

**RECIPIENT OF APT US&C AWARD OR STATE/PROVINCE AWARD:**

(Attach proof of award.)

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

(Use additional sheet(s) as necessary.)

**NATIONAL CERTIFICATION PROGRAM:**

(Attach proof of certification.)

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

(Use additional sheet(s) as necessary.)

**TOTAL EXPERIENCE POINTS**

**TOTAL** \_\_\_\_\_



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

## EDUCATION MAINTENANCE STANDARDS

	maximum allowed
• 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)	25 points
• Bachelor degree in public administration, accounting, finance or related field	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
• attendance at an APT US&C approved Advanced Institute (up to 30 points) <b>AND/OR</b> attendance at education programs <b>pre-approved</b> by APT US&C (assignment of points based on review of program agendas by the CPFA Certification Committee)	40 points
• pre-approved treasury-related education by non-APT statewide or province-wide organizations (1 point per 4 hours of instruction)	5 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 APPROVED 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**

**TOTAL** \_\_\_\_\_

### SUMMARY

TOTAL EXPERIENCE POINTS	_____
TOTAL EDUCATION POINTS	+ _____
TOTAL EXPERIENCE AND EDUCATION POINTS	=====



**ASSOCIATION OF PUBLIC TREASURERS  
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