



2022 Annual Conference Point Tally Sheet

August 7-10 • Henderson, Nevada

Speaker/Topic	Description	Class Hours	CPFA Points	ACPFA Points	CPFIM Points	Points Earned
Sunday, August 7, 2022 and Wednesday, August 10, 2022						
Greg Prost CPFIM Training (Sunday Only)	This nationally recognized certification program is designed to provide the confidence and knowledge to manage your investments better. Learn about: investment instruments; banks, brokers and advisors; cash flow; governance and your investment policy; safety, liquidity and yield; and defining your strategy.	6.0	3.0		N/A	
Greg Prost ACPFIM Training (Wednesday Only)	Take your understanding even further with the Advanced CPFIM training. With a deep look into analysis and investment strategy, attendees will gain a more thorough knowledge of how to quantify an investment policy objective and the tools needed to achieve it.	5.0	2.5	5.0	N/A	
Monday, August 8, 2022						
How to Make Your Business Human Matt Havens, Opening Keynote Speaker 8:30-9:30 am PT Recorded	If you want to be on the leading edge of tomorrow's success, then you need to have a personal mindset (and lead teams) rooted in the foundations of The Human Way™. Takeaways include: an understanding of the Four Human Truths and how they impact our behavior as humans-first, but also as employees and customers; how to implement a people-first approach to leadership that will drive engagement and resolve the seemingly endless "work/life balance" debate; how to create an environment where people can be their best version of themselves; how to create a place where fear and failure are not only acceptable, but celebrated as opportunities for true growth; how to balance short-term needs against long-term goals in a way that reduces personal stress and improves strategic decision-making; and, how we take ownership of our choices – and our reactions.	1.0	.5			
Understanding the Risk Environment for Public Treasury Professionals John Basso, Deloitte & Touche 9:45-10:45 am PT Recorded	This session will cover leading practices in managing specific risks that public treasurers face as well as covering a framework for understanding, prioritizing, and managing risks across the full constellation of challenges and opportunities (Financial, Operations, Regulatory, Reporting, Extended Enterprise, Strategic, and Technology) a public organization faces.	1.0	.5	1.0	1.0	
BREAKOUT Designing and Implementing Financial Wellness Programs Beth Conradson-Cleary, City of Milwaukee 11:00 am – Noon PT Recorded	The topic of financial wellness seems to be everywhere, spanning multiple industries, but what exactly does it mean for municipal retirement plans? Join this discussion on the meaning of financial wellness and hear about the City of Milwaukee's award-winning financial wellness program, including how the pandemic has impacted program offerings and engagement.	1.0	.5			
BREAKOUT ARPA Funds Bret Padgett, Comstock Charter Township, MI and Peter Gray, City of West Lafayette, IN 11:00 am-Noon PT	Funding provided under ARPA provides a unique opportunity for state and local governments to make strategic investments in their communities. This session, delivered by your treasury peers, will provide their experience with the guidelines and restrictions for both non-entitlement and entitlement entities.	1.0	1.0			



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What is Crypto Currency and Its Impact on Municipalities Aaron Jacob and Nathan Jones, TaxBit 1:00 – 2:00 pm PT- Recorded	As cryptocurrency becomes more mainstream, states & localities will need to develop a comprehensive strategy related to the tax implications as well as reporting requirements for this emerging asset class. This session will focus on the challenges and opportunities for taxing authorities at the state, county and city levels.	1.0	.5	1.0	1.0	
BREAKOUT Inflation: Navigating Today's Investment Environment Jason Headings and Nick Vaccari, Meeder Investment Management 2:15-3:15 pm PT - Recorded	Inflation is at levels not seen in the past 40 years and the Federal Reserve is committed to using their tools to combat it. We will look back at prior episodes of high inflation and the current inflation landscape to gain perspective on the impact to your investment portfolio. All of this will be tied together to help you determine the prudent course to apply to your investment strategy.			1.0	1.0	
BREAKOUT Understanding the Public Service Loan Forgiveness Program and its Temporary Waivers Betsy Mayotte, Institute of Student Loan Advisors 2:15-3:15 pm PT	Learn about the Public Service Loan Forgiveness (PSLF) program and the eligibility requirements, including temporary waivers announced in October 2021 (and ending on October 31, 2022) that address many of the barriers that public sector employees faced in the past, such as having the wrong loan type or making payments on the wrong payment plan. Learn how to help employees and participants take advantage of the relaxed requirements and discover the impact student loan debt support can have on employee retention.	1.0	.5			
Trends in Cyber Crime Jacob Cinco, US Secret Service 3:30-4:30 pm PT Recorded	The presentation will cover the USSS perspective on current online fraud and scams affecting private business, government entities, and the average citizen. Topics will also include examples on how law enforcement responds to cyber incidents and resources used to combat cyber-enabled financial crimes.	1.0	.5	1.0		
Tuesday, August 9, 2022						
Are Your Business Payments Safe John Heyel, Paymerang 8:00-9:00 am PT Recorded	Did you know your current check processing is posing risks and exposing your AP payments to payment fraud risks? With internal and external threats on the rise, accounting teams have no time to lose in mitigating the risk of payment fraud, safeguarding sensitive banking information, and ensuring the integrity of the accounting system. Electronic payment solutions, such as virtual cards and ACH transactions, provide greater protections than paper checks, mitigating the risk of payment fraud. Discussion will include discussions on the increased payment fraud risks to your organization; highlights of recent payment fraud incidents that have impacted businesses and learning how to safeguard your business payments through e-payments.	1.0	.5	1.0		
Active Shooter Training: Assessment and What You Can Do Jim Lopey, US Homeland Security 9:15-10:45 am PT Recorded	Designed by FEMA and NTAC for those who work in public areas, this class defines the term “active shooter” and examines the profile of the typical offender. Tactics, weaponry, warning signs and the pre-planning efforts of the typical active shooter are examined. Case studies of active shooter events will provide insight and instruction for incidents which could evolve into active shooter episodes or violence. Includes preventative and intervention strategies; what actions to take, how to mitigate active shooter incidents, and the importance of site threat assessments, training, and exercises.	1.5	.75	1.5		



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BREAKOUT Bill Better in 2022 Shane Leo, Paymentus 11:00 am-Noon PT Recorded	Digital wallets, cryptocurrency, oh my! With more payment channels and payment methods emerging to meet growing customer demands, let us share with you what's new and what's needed to bill better in 2022.					
BREAKOUT All-in on Portfolio Income Optimization Justin Hoogendoorn, Hilltop Securities 11:00am-Noon PT	Moving into 2022, public treasurers faced another year of dreadfully low income from their portfolio. However, the ugly specter of inflation forced the Fed onto a rapid path of rate hikes. This path chased the entire yield curve to levels where public entities could finally earn attractive rates on the investment portfolio. We will explore government-backed investments that can outpace cash and seek solutions to optimize income within typical public portfolio guidelines.	1.0	.5	1.0	1.0	
The Future of Investing Greg Prost, Robinson Capital 1:15-2:15 pm PT Recorded	The business world is changing faster than most people realize as disruption from technological innovations increases at an increasing rate. Greg discusses a number of those disruptions from a corporate bond investor's viewpoint.	1.0	.5	1.0	1.0	
BREAKOUTS (3) APT Exchange Population < 10,000 Population 10,000-100,000 Population > 100,000	This session is provided as a peer-to-peer knowledge sharing. Attendees will bring questions and discussion points to promote the sharing of issues and best practices. The best way to learn from your peers is to participate in these breakout groups.	1.0	.5			
Economic Update: 2023-23 US Inflation and Interest Rate Outlook: From a Pandemic to a Recession? Dimitri Delis, Piper Sandler 3:45-4:45 pm Recorded	Aggressive monetary and fiscal policies to combat COVID-19 have ushered the consensus view that high inflation is here to stay. Details will be given as to why the current economic backdrop does not present an inflationary threat similar to the 1970s. While the market is pricing an additional 8 rate hikes, this session examines what factors will prevent the Fed from being as aggressive. Recession next year is not necessarily assured, but prospects of a soft landing are looking increasingly less credible. With borrowing costs increasing and credit spreads widening, most major stock market indices have slipped into bear market territory, and the selloff may not be over. We will answer the question of how low interest rates and equities can go.	1.0	.5	1.0	1.0	
Wednesday, August 10						
How Whistleblowers Shape History and “All the Queens Horses” Screening and Q&A Kelly Richmond Pope 8:00am-11:00 am PT Recorded	Fraud researcher and documentary filmmaker Kelly Richmond Pope shares lessons from some of the most high-profile whistle-blowers of the past, explaining how they've shared information that has shaped society -- and why they need our trust and protection. This session will also provide a screening of the movie Kelly produced, All the Queens Horses, followed by a question and answer period.	3.0	1.5			