

APT US&C 57TH ANNUAL CONFERENCE

August 13-16, 2023
Salt Lake City, Utah



*Elevate your career -
Bee inspired!*



Association of Public Treasurers of the United States & Canada
in Partnership with the Utah Association of Public Treasurers

WELCOME TO THE 57TH ANNUAL CONFERENCE

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Mission

“To provide quality treasury management education and training, professional certification, peer interaction, and professional connection opportunities for public treasury and financial officials.”

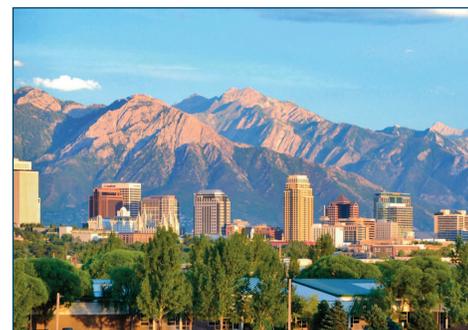


Founded in 1965, APT US&C represents public treasury and finance officials in local, county, and state/provincial governments throughout North America. The Association provides educational seminars and conferences, publications, policy and legislative information, and technical assistance to members. This includes four nationally recognized certifications: Certified Public Finance Administrator (CPFA), Advanced CPFA, Certified Public Funds Investment Manager (CPFIM) and Advanced CPFIM as well as policy certifications and training. Visit www.APTUSC.org for more information.

Welcome to Salt Lake City, Utah

Salt Lake City is a modern city set at the foot of spectacular mountains - it’s a place of wide open vistas and fresh perspectives. The conference will capitalize on all that the city has to offer: an afternoon in the mountains, local culture, and an event at the state Capitol, which is only a few minutes from the hotel. Downtown shopping, browsing, restaurants, and nightlife are all a quick walk or light rail ride away.

If you arrive early or stay late, you’ll find yourself an easy drive away from some of the most amazing natural attractions and national parks. Hiking, biking, touring, and golfing are all close to the hotel and several national parks (Arches, Canyonlands, Bryce Canyon, Zion, and Capitol Reef) are all within a day’s drive of Salt Lake City. View more on Salt Lake City at www.visitsaltlake.com.



PRESIDENT'S WELCOME



Welcome to our 57th Annual Conference! We're so happy to be in Salt Lake City in partnership with our state affiliate, the Utah Association of Public Treasurers.

This year's conference theme is "Elevate Your Career - Bee Inspired." This is in recognition of the Utah state emblem, the beehive, and the hard work and determination that it represents. It's also hard work and determination that will enable each of us to elevate our career. As the President of APT US&C over the last year, I have focused on training - providing plenty of opportunities to public treasury officials like you to learn, grow, and advance your career.

In addition to the training provided during our Annual Conference (to both in-person attendees and those attending remotely via livestreaming), APT US&C offers many ways to learn and earn certifications: **Front Line Cash Handling** online training is designed for anyone in a treasury office or at locations throughout an organization who handle cash. We also continue to offer our in-depth **Cash Handling** training which includes the core material as well as best practices to minimize risk and enhance security while processing transactions. **Internal Controls** training is a two part series including an introduction to internal controls and implementing internal controls. **Certified Public Funds Investment Manager (CPFIM)** training is designed to provide the confidence and knowledge to manage your investments better. And there's an **Advanced CPFIM** certification that focuses on analysis and investment strategy and how to quantify investment policy objectives. Additionally, APT US&C offers timely topics online and even independent learning courses. I encourage each of you to take advantage of these training opportunities - and share the experience with your colleagues at your municipality, regional organizations, and state groups. Our goal is to share these rich learning opportunities with all public treasury professionals.

As you know, an Annual Conference is a huge undertaking with a lot of moving parts. I would like to thank our Annual Conference Committee - the conference wouldn't exist without the efforts of these wonderful folks from Utah and across the country (a full list is on page 20). We appreciate their leadership and guidance!

We are also grateful for the support and collaboration of our corporate members and sponsors - it is vital to our success and the key to the outstanding training APT US&C provides throughout the year and at the conference. Make sure to visit all the exhibits throughout our Exhibitor Hall, and don't miss the Exhibitor Reception on Monday immediately following our last session.

This year's Awards Ceremony will be held at the stunning rotunda at the Utah State Capitol on Tuesday evening - make sure to join us! We will transition the Association's leadership through the installation of our 2023-24 Board of Directors during the banquet. We have such a strong group of leaders on the board, I can't wait to see what they will accomplish in the coming years.

I have truly enjoyed my term as President, especially getting to meet so many of you as I traveled to your meetings and conferences. Serving as the APT US&C President for the last year has been such a rewarding opportunity - I thank you for the honor and the privilege. I look forward to seeing you in the coming years as I continue to support my local community, state affiliate, and the Association.

Best Always,

A handwritten signature in blue ink that reads "Julie Silbernagel".

Julie Silbernagel
APT US&C President
Treasurer, City of Buffalo, Wyoming

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CONFERENCE SCHEDULE

Saturday, August 12

1:00 pm - 5:00 pm	Registration	Casper Room
2:00 pm - 6:00 pm	Golf Event	Bountiful Ridge Golf Club

Sunday, August 13

8:00 am - 4:00 pm	Registration	Casper Room
9:00 am - 5:30 pm	Exhibitor Set-Up	Ballroom Reception & Wyoming/Idaho/Arizona Rooms
9:30 am - 10:00 am	Tabernacle Choir - Music & the Spoken Word	Temple Square Conference Center*
	<i>Doors open 8:30 am; guests must be seated by 9:15 am</i>	
Noon - 4:00 pm	Mountaintop Experience at Oktoberfest	Snowbird Resort
	<i>Meet in Little America Valet Area for Transportation. Buses will start a continuous loop at 11:30 for the 35 minute trip.</i>	
4:30 pm - 5:30 pm	Affiliate Presidents Reception	
6:00 pm - 9:00 pm	Welcome Reception	Flanker Kitchen & Sporting Club*

*Falls within TRAX light rail free fare zone. Blue and green lines run every half hour on Sundays. Use Court House station from Little America to Temple Square or Arena station. See page 21 for more information.

Monday, August 14

7:00 am - 8:00 am	Registration	Casper Room
7:00 am - 8:00 am	Breakfast	Mezzanine/East Terrace, 2nd Floor
7:30 am - 5:30 pm	Exhibit Hall Open	Ballroom Reception & Wyoming/Idaho/Arizona Rooms
8:00 am - 8:30 am	Presentation of Colors & Opening Remarks	Ballroom B/C
8:30 am - 9:30 am	Opening Keynote Address: How to Turn Complainers Into Collaborators	Ballroom B/C
	<i>Will Bowen</i>	
9:30 am - 9:45 am	Break in Exhibit Hall	
9:45 am - 10:45 am	Understanding the Layers of Card Processing to Protect Your Budget	Ballroom B/C
	<i>Casey J Leloux, CEO, Intellipay</i>	
10:45 am - 11:00 am	Break in Exhibit Hall	Ballroom Reception & Wyoming/Idaho/Arizona Rooms
11:00 am - Noon	Concurrent Sessions	
	Investment Decisions – Best Practices and Real World Case Studies	Ballroom B/C
	<i>Jason Headings/Jason Click, Meeder Investment</i>	
	Utilizing Tax-Exempt Trusts for Retention, Recruiting, and OPEB Reduction	Ballroom A
	<i>Joel J. Babbitt, NPPFA Benefits Group</i>	
Noon - 1:00 pm	Lunch	Mezzanine/East Terrace, 2nd Floor
1:00 pm - 2:00 pm	First Amendment Audits	Ballroom B/C
	<i>Jason A. Watterson, Utah Local Governments Trust</i>	
2:00 pm - 2:15 pm	Break in Exhibit Hall	Ballroom Reception & Wyoming/Idaho/Arizona Rooms
2:15 pm - 3:15 pm	Concurrent Sessions	
	Municipal Market Update	Ballroom B/C
	<i>Peter Stettler, Piper Sandler</i>	
	Treasurer-to-Treasurer	Ballroom A
	<i>Moderated by Ted Elder, UAPT and Julie Silbernagel, City of Buffalo, Wyoming</i>	
3:15 pm - 3:30 pm	Break in Exhibit Hall	Ballroom Reception & Wyoming/Idaho/Arizona Rooms
3:30 pm - 4:30 pm	Challenges of the Modern Workspace	Ballroom B/C
	<i>P. Corper James, Mabey Wright & James, PLLC</i>	
4:30 pm - 5:30 pm	Exhibitor & Sponsor Reception	Ballroom Reception & Wyoming/Idaho/Arizona Rooms

All educational sessions and exhibit hall are at the Little America. Times are in the Mountain Time Zone. General and the concurrent sessions in Ballroom B/C will be livestreamed to virtual attendees. Schedule subject to change.

CONFERENCE SCHEDULE

Tuesday, August 15

7:00 am - 8:30 am	Breakfast Mezzanine/East Terrace, 2nd Floor
7:30 am - 3:45 pm	Exhibit Hall Open Ballroom Reception & Wyoming/Idaho/Arizona Rooms
8:30 am - 9:30 am	Becoming Rock Star Leaders Ballroom B/C <i>Jonathan Baker, Zions Bancorporation</i>
9:30 am - 9:45 am	Break in Exhibit Hall Ballroom Reception & Wyoming/Idaho/Arizona Rooms
9:45 am - 10:45 am	Concurrent Sessions
	Everything You Wanted to Know About Chat GPT... but were afraid to ask Ballroom B/C <i>Greg Prost, CIO, Robinson Capital Management, LLC</i>
	GASB Update – What You Need to Know Ballroom A <i>Anthony M. Cervini, CPA, CFE, Sikich LLP</i>
	Federal Reserve Bank Tour Meet in Hotel Lobby <i>Ride TRAX blue or green line from Court House Station to City Center Station</i> <i>Choose from three tour times: 10:00 - 10:30, 10:45 - 11:15, 11:30 - Noon.</i>
10:45 am - 11:00 am	Break in Exhibit Hall Ballroom Reception & Wyoming/Idaho/Arizona Rooms
11:00 am - Noon	Social Media for Public Treasurers: Opportunities, Challenges, and Tools <i>Brittany Griffin, Utah Office of State Treasurer</i> Ballroom B/C
Noon - 1:00 pm	Lunch Mezzanine/East Terrace, 2nd Floor
12:30 pm - 1:00 pm	Annual Meeting Ballroom B/C
1:00 pm - 2:00 pm	Creating Resilience and Maturity to Defend Cybersecurity Threats Resources Ballroom B/C <i>Rick R. Gardner, Cybersecurity & Infrastructure Security Agency</i>
2:00 pm - 2:15 pm	Break in Exhibit Hall Ballroom Reception & Wyoming/Idaho/Arizona Rooms
2:15 pm - 3:15 pm	Concurrent Sessions
	Embrace the Power of Technology Ballroom B/C <i>John Melvin, US Bank</i>
	Common Mistakes in Managing Fixed Income Portfolios Ballroom A <i>Chris Nicholl, Hilltop Securities</i>
3:15 pm - 3:30 pm	Break Ballroom Reception & Wyoming/Idaho/Arizona Rooms
3:30 pm - 4:30 pm	Economic Update Ballroom B/C <i>Scott Burnett, Zions Capital Advisors</i>
3:45 pm - 5:00 pm	Exhibitor Breakdown Ballroom Reception & Wyoming/Idaho/Arizona Rooms
6:00 pm - 9:00 pm	Awards Banquet & Installation of Officers Utah State Capitol <i>Meet in Valet Area for transportation to State Capitol. Busses will start a continuous loop at 5:45 for the ten minute trip.</i>

Wednesday, August 16

7:00 am - 8:30 am	Breakfast Mezzanine/East Terrace, 2nd Floor
8:30 am - 9:30 am	Fraud, Corruption and Running the Gamut of Bad Behavior: A Look at Recent Cases Ballroom B/C <i>Stewart M. Young, District of Utah - Department of Justice</i>
9:30 am - 9:45 am	Break
9:45 am - 10:45 am	Opioid Epidemic Ballroom B/C <i>Christian Mickelsen, DEA Task Force, IRS</i>
10:45 am - 11:00 am	Break
11:00 am - Noon	Ethics: Nobody Needs It - Until They Get Caught! Ballroom B/C <i>Dr. Dale Henry, Closing Keynote Speaker</i>
1:00 pm - 6:00 pm	Advanced CPFIM Training Arizona Room <i>Greg Prost, CIO, Robinson Capital Management, LLC</i>

See Special Event Information on Page 21

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Founded in 2019, the NPPFA developed its roots in a state specific not-for-profit umbrella organization representing police and fire defined benefit retirement funds in 1985. As the demand grew for prudent stewardship over governmental deferred compensation 457 plans, the NPPFA was established to offer training, services, and support to pension trustees and their organizations.



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Exhibitors

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CONFERENCE PROGRAMMING



Monday, 8:30 am - 9:30 am • Ballroom B/C

Opening Keynote Address: **GRIFE: How to Turn Complainers Into Collaborators** *Will Bowen*

In this engaging, inspiring, and humorous presentation, you'll discover how to recognize the motivation behind complaints and, most importantly, how to redirect these negative complaints into positive collaboration. More than just an engaging and inspiring speech, you'll receive real-world tools, tips, and practical takeaways that will provide lasting positive change within your organization.



Monday, 9:45 am - 10:45 am • Ballroom B/C

Understanding the Layers of Card Processing to Protect Your Budget *Casey J Leloux, CEO, Intellipay*

By understanding the layers, players, and costs involved in the credit card system you can begin to protect your budget. This presentation will unwrap the complex layers of credit card technology and how all of the different processing options affect the fees you pay.

Monday, 11:00 am - Noon • Concurrent Session (1 of 2) • Ballroom B/C



Investment Decisions – Best Practices and Real World Case Studies

Jason Headings, Senior Vice President, Meeder Investment
Jason Click, President, Meeder Investment

Learn through the struggles and successes of others! We'll walk through several real-life examples, both good and bad, of issues faced by fiscal officers. Topics will include determining cash versus core investment portfolios, project funds, business continuity, the roles of service providers, communication, and self-advocacy.



Monday, 11:00 am - Noon • Concurrent Session (2 of 2) • Ballroom A

Utilizing Tax-Exempt Trusts for Retention, Recruiting, and OPEB Reduction *Joel J. Babbitt, NPPFA Benefits Group*

Find the answers to important questions in today's ultra-competitive world of finding, hiring, and retaining top-notch employees. This presentation will provide actionable examples on how your organization can differentiate themselves and best utilize the federal tax code for the benefit of both organization and employees.

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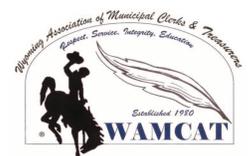
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Sunday Welcome Reception Sponsors

Thank you to the state affiliate organizations that provided support for the Sunday Welcome Reception!

- Indiana League of Municipal Clerks and Treasurers
- Michigan Municipal Treasurers Association
- Ohio Association of Public Treasurers
- Utah Association of Public Treasurers
- Wyoming Association of Municipal Clerks & Treasurers



CONFERENCE PROGRAMMING



Monday, 1:00 pm - 2:00 pm • Ballroom B/C

First Amendment Audits

Jason A. Watterson, CIH, CHMM, ARM-P, CPSI, Loss Prevention Consultant, Utah Local Governments Trust

First Amendment audits have increased in frequency and are often unsettling experiences for the municipal employees who become the subject of these filmed interactions. Make sure you and your office are prepared in order to reduce the risk of embarrassment and exposure.



Monday, 2:15 pm - 3:15 pm • Concurrent Session (1 of 2) • Ballroom B/C

Municipal Market Update

*Peter Stettler, Director, Municipal Credit Analyst
Piper Sandler*

This presentation will review the challenges of the last year or two and carry into the current situation. With the Federal Reserve poised to pause its rate hikes in the second half of 2023, capital markets should stabilize, providing opportunities for both investors and issuers to return to the market. This presentation will discuss current economic trends and what they may mean for both municipal investors and issuers as well as municipal credit quality. We will also address recent changes in rating agency methodology affecting cities and counties.



Monday, 2:15 pm - 3:15 pm • Concurrent Session (2 of 2) • Ballroom A

Treasurer-to-Treasurer

*Ted Elder, UAPT
Julie Silbernagel, City of Buffalo, Wyoming*

Bring your questions and discussion points! This session is designed to promote the sharing of issues and best practices. The best way to learn from your peers is to actively participate by sharing your challenges and successes with other attendees.



Monday, 3:30 pm - 4:30 pm • Ballroom B/C

Challenges of the Modern Workspace

P. Corper James, Mabey Wright & James, PLLC

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CONFERENCE PROGRAMMING



Tuesday, 8:30 am - 9:30 am • Ballroom B/C

Becoming Rock Star Leaders

Jonathan Baker, Senior VP, Zions Bancorporation

As the Rolling Stones said, “It’s only rock and roll, but I like it!” The focus of Jon’s presentation is how the principles of leadership are intertwined with rock and roll music. The emotional and physical connection to music is so powerful that it has produced leaders who have influenced generations. This highly interactive and lively discussion will address how you can develop your own individual leadership skills in both your work and personal lives.



Tuesday, 9:45 am - 10:45 am • Concurrent Session (1 of 3) • Ballroom B/C

Everything You Wanted to Know About Chat GPT ... but were afraid to ask

Greg Prost, CIO, Robinson Capital Management

Chat GPT is an artificial intelligence model that uses deep learning to generate human-like text in response to prompts, and it has quickly taken the world by storm since its introduction last December. Chatbots are not a new idea, but Chat GPT raised the bar with its almost spooky ability to compose essays, create art and music, have philosophical conversations, and even write computer code. This presentation addresses the immediate implications of Chat GPT and other AI programs on business operations and competitive advantages, as well as the disruptions that are coming more quickly than people realize.



Tuesday, 9:45 am - 10:45 am • Concurrent Session (2 of 3) • Ballroom A

GASB Update – What You Need to Know

Anthony M. Cervini, CPA, CFE, Partner-in-Charge, Government Services, Sikich LLP

This session will provide a high level overview of the recent pronouncements issued by the Governmental Accounting Standards Board. The session will cover what are expected to be the most impactful of these new standards, including GASB Statement No. 94 (Public-Public and Public-Private Partnerships and Availability Payment Arrangements), GASB Statement No. 96 (Subscription Based Information Technology Arrangements), and GASB Statement No. 101 (Compensated Absences).

Tuesday, 10:00, 10:45, 11:30 • Concurrent Session (3 of 3) • Meet in Lobby

Federal Reserve Bank Tours

The Utah branch of the Federal Reserve Bank will provide an inside look at their operations; groups are limited to 20 people for each of the three tours. Tour start times are at 10:00, 10:45, and 11:30. If you are interested in participating in a tour, you must sign up prior to the tour, either at registration or at sign-up sheets available Monday and Tuesday morning. A host guide will lead each group from the hotel to the Federal Reserve bank, you must meet in the hotel lobby twenty-five minutes prior to your tour start time in order to travel to the bank. Tour participants will need to walk about five minutes to the Courthouse UTA TRAX light rail station, board the rail car for a quick (free) ride, then walk about another five minutes to the bank.





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Navigating the Conference

The Little America Hotel has an amazing Conference Center - main sessions will be in the Grand Ballroom B/C, which are on the left as you walk through the Ballroom Reception area. Breakout sessions will be on the right, in the Grand Ballroom A.

The Exhibit Hall (and refreshments) will be in the Grand Ballroom Reception area and across the hall in the Wyoming Room, Idaho Room, and Arizona Room.

Breakfast and lunch will be upstairs in the Mezzanine space, with tables set up inside in the Flagstaff, Sun Valley, and Tucson rooms and outdoor seating on the East Terrace.

CONFERENCE PROGRAMMING



Tuesday, 11:00 am - Noon • Ballroom B/C

Social Media for Public Treasurers: Opportunities, Challenges, and Tools

Brittany Griffin, Policy and Communications Deputy, Utah Office of State Treasurer

This session will explore the opportunities social media presents for public treasurers to engage with constituents, as well as the challenges associated with navigating the digital landscape, including maintaining security and privacy, managing public perception, and ensuring compliance with local, state, and federal laws. Participants will walk away with practical tips, best practices, and a toolkit to leverage in their treasury operations.



Tuesday, 1:00 pm - 2:00 pm • Ballroom B/C

Creating Resilience and Maturity to Defend Cybersecurity Threats Resources

Rick R. Gardner, Cybersecurity Advisor, Cybersecurity and Infrastructure Security Agency

CISA's purpose is to lead the collaborative national effort to strengthen the security and resilience of America's critical infrastructure. This presentation will provide an overview of the broad range of assessments and cybersecurity tools the Cybersecurity Advisor program provides to help you with cybersecurity preparedness, risk mitigation, and incident response capabilities. CISA provides these services at no cost to public and private sector owners and operators of critical infrastructure, and state, local, tribal, and territorial (SLTT) governments partnerships and direct assistance activities.



Tuesday, 2:15 pm - 3:15 pm • Concurrent Session (1 of 2) • Ballroom B/C

Embrace the Power of Technology

John Melvin, Vice President, Working Capital Consultant, Global Treasury Mgmt., US Bank

In today's dynamic landscape, technology is reshaping the way we connect, harness data, and optimize our operations. To thrive in this ever-changing environment, it's crucial to leverage these transformative technologies to streamline processes and exceed customer expectations. However, upgrading and transforming your back-office platforms can seem overwhelming, even in the best of circumstances. Join us as we delve into how organizations can navigate these changes with efficiency and effectiveness while minimizing risks and enhancing the customer experience.



Tuesday, 2:15 pm - 3:15 pm • Concurrent Session (2 of 2) • Ballroom A

Common Mistakes in Managing Fixed Income Portfolios

Chris Nicholl, Managing Director and Senior Portfolio Manager, Hilltop Securities

A discussion of some common themes often at the root of sub-optimal decision making which can, in turn, lead to investment losses. Some of these are simple, yet bear repeating, while others are more nuanced and technical. Some are procedural; some delve more into the psychology inherent in the investment process. In all cases, the goal is to raise the level of awareness to be able to identify circumstances in which more deliberation should accompany the investment management process.



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If you're wondering about our conference logo, it's tied in to our host state, Utah. We're sure that once you arrived in Salt Lake City, you've seen bee and hive logos everywhere. Utah is known as the beehive state, not because of actual

honey production, but because of the history of industry in the Utah community, with each person working together to support and help one another. Of course, the honey here in Utah is great, too! We hope you'll join us in celebrating Utah and "Bee Inspired."

CONFERENCE PROGRAMMING



Tuesday, 3:30 pm - 4:30 pm • Ballroom B/C

Economic Update

Scott Burnett, President, Zions Capital Advisors

Scott will bring his more than 42 years of experience in trading, sales and managerial experience in capital markets and the financial services industry to this presentation. He will provide an update on current economic data and the outlook for the economy. Scott will also discuss the Fed and interest rates.



Wednesday, 8:30 am - 9:30 am • Ballroom B/C

Fraud, Corruption and Running the Gamut of Bad Behavior: A Look at Recent Cases

Stewart M. Young, Assistant US States Attorney, District of Utah

With a look at several recent fraud and corruption cases, Stewart will help attendees understand how they can protect themselves and their organizations from new types of fraud. Cases will cover a wide array of criminal behavior, including crimes relating to payment schemes, ransomware, and other concerns typically faced by public entities.



Wednesday, 9:45 am - 10:45 am • Ballroom B/C

The Opioid Epidemic

Christian Mickelsen, DEA Task Force, IRS

Christian will relate his personal experience in investigating and combating the opioid epidemic, from its beginning stages and origins, to how it progressed and thrived, how it changed, and how it exists today. Special insights on the aspects of money laundering methods and how they evolved as the source of opioids shifted from domestic to international production. Case examples will be used to shed light on law enforcement's efforts to combat this epidemic.



Wednesday, 11:00 am - Noon • Ballroom B/C

Ethics: Nobody Needs It ... Until They Get Caught!

Dr. Dale Henry, Closing Keynote Speaker

No one really gets hurt by twisting the truth a little – right? Everyone wants to do the right thing – right? Nope! We want to do the easy thing. In this empowering and life changing presentation everyone will leave with a new understanding of – and appreciation for – the power of self-ethical monitoring.



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A Special Thank You

This year's Annual Conference is a **joint conference** brought to you by APT US&C in cooperation with the Utah Association of Public Treasurers. The dedication and commitment of the UAPT, its Board of Directors, and its members has been incredible. So much of what was offered this year has been a direct outcome of the UAPT's involvement in the planning, implementation, and financial support of the conference. APT US&C

couldn't be more grateful for this stellar group of treasury professionals!

UAPT Board of Directors: Chip Dawson - President, Mark McRae - President Elect, Jeannine Teel - Vice President, Megan Mills - Treasurer, Sharon Harper - Secretary, Ted Elder - Past President, Dawn Brecke, Jill Hunt, Jennifer Chapman, Laura Woolsey, Diane Burandt, Judy Schiers, Susan Balls, Laurie Moore, Jody Anderson.

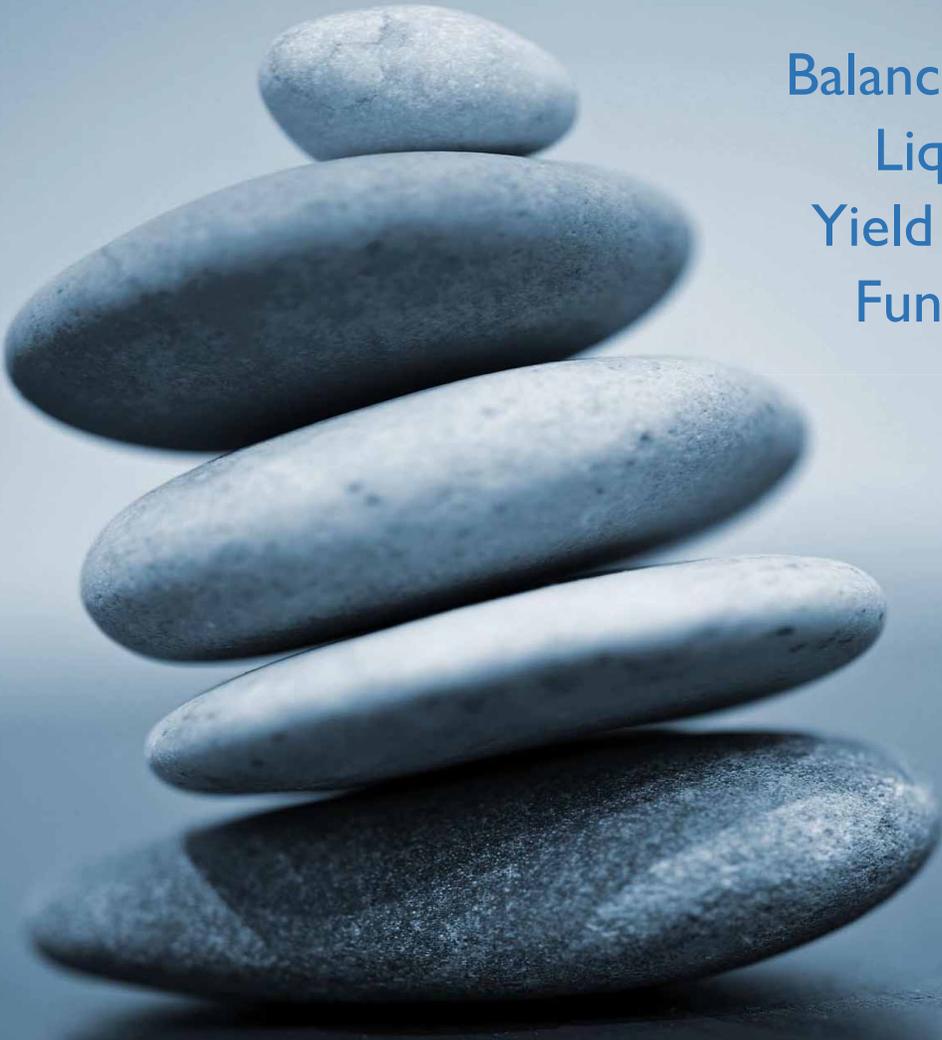
CONFERENCE PROGRAMMING



Wednesday, 1:00 pm - 6:00 pm • Arizona Room

ACPFIM - Advanced Certified Public Funds Investment Manager Training
Greg Prost, CIO, Robinson Capital Management

The ACPFIM provides further instruction on investment analysis, strategy, and how attendees can apply lessons to their own organization. This program requires a written exam. Open to CPFIM graduates.

A photograph of five smooth, rounded, light-colored stones stacked vertically on a dark surface. The stones are arranged in a slightly curved line, creating a sense of balance and stability. The background is a soft, out-of-focus light blue.

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- ✓ Find New Solutions
- ✓ Learn Ways to Save
- ✓ Take Ideas Back to Your Office



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Data as of 05/31/2023. Many factors affect performance including changes in market conditions and interest rates and in response to other economic, political, or financial developments. Investment involves risk including the possible loss of principal. No assurance can be given that the performance objectives of a given strategy will be achieved. The information presented should not be used in making any investment decisions. This material is not a recommendation to buy, sell, implement, or change any securities or investment strategy, function, or process. Any financial and/or investment decision should be made only after considerable research, consideration, and involvement with an experienced professional engaged for the specific purpose. Public Trust Advisors is not a bank and your investment in Public Trust Advisors is not insured or guaranteed by the Federal Deposit Insurance Corporation or any other government agency. Past performance is no guarantee of future results. Any financial and/or investment decision may incur losses.



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*Thank
You!*

2023 Conference Planning Committee

This fantastic group from around
the country was integral in the
planning and implementation of
this year's Annual Conference

Vicki Kitchen, Chair,
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Jody Anderson, City of Delta, Utah
Susan Balls, Hyde Park City, Utah
Deb Block, City of Mishawaka, Indiana
Dawn Brecke, Town of Springdale, Utah
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Judy Schiers, City of Parowan, Utah
Julie Silbernagel, City of Buffalo, Wyoming
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Tricia Wiggle-Bazzy,
Green Oak Charter Township, Michigan

guidebook

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SPECIAL EVENTS

Golf Event at Bountiful Ridge Golf Club

For those who signed up to play golf, we look forward to seeing everyone at the Course for a great afternoon of golf and fun at the 19th hole! The Club is about 12 miles from the Little America Hotel.

Tabernacle Choir at Temple Square (Conference Center)

The Tabernacle Choir presents the “Music & the Spoken Word” each Sunday morning on Temple Square. Admission to public performances is free but limited to those eight years of age and older. Doors open to the public at 8:30 a.m. and guests should be seated by 9:15 a.m. when the doors are closed. The performance is 30 minutes in length and ends at 10:00 a.m. Use the UTA TRAX light rail for free transportation from the Little America (the Courthouse Station is a half block from the hotel) to the Temple Square Station. Make sure to give yourself enough time to get from the station to the Conference Center, it’s a walk of about a block. Trains run every half hour on the weekend.



Mountaintop Experience at Snowbird Resort/Oktoberfest

Don’t miss this incredible experience, compliments of the UAPT. There will be buses running between Little America and the Snowbird Resort from 11:30 am to 4:30 pm for the 35 minute trip. Participants will receive an all-day activity pass that includes access to Scenic Tram Rides, Alpine Slide, ZipWhipper, Climbing Wall, Ropes Course, Summer Tubing, Bungee Trampoline, Spider Mountain, and more. Attendees will also receive a voucher good for food and beverages at Snowbird. Sunday is the first day of Snowbird’s Oktoberfest celebration, so there will be plenty of food, drinks, and fun. Get your passes at registration and meet in the Little America valet area for transportation.



Welcome Reception at Flanker Kitchen & Sporting Club

Meet up with all of your other conference attendees at this Sunday evening event (from 6:00 pm - 9:00 pm) that will feature plenty of food, entertainment including karaoke, golf simulators, and duckpin bowling, and a cash bar. Use the UTA TRAX light rail for free transportation from the Little America (the Courthouse Station is a half block from the hotel) to the Arena Station. Trains run every half hour on the weekend.

Awards Banquet at the Utah State Capitol

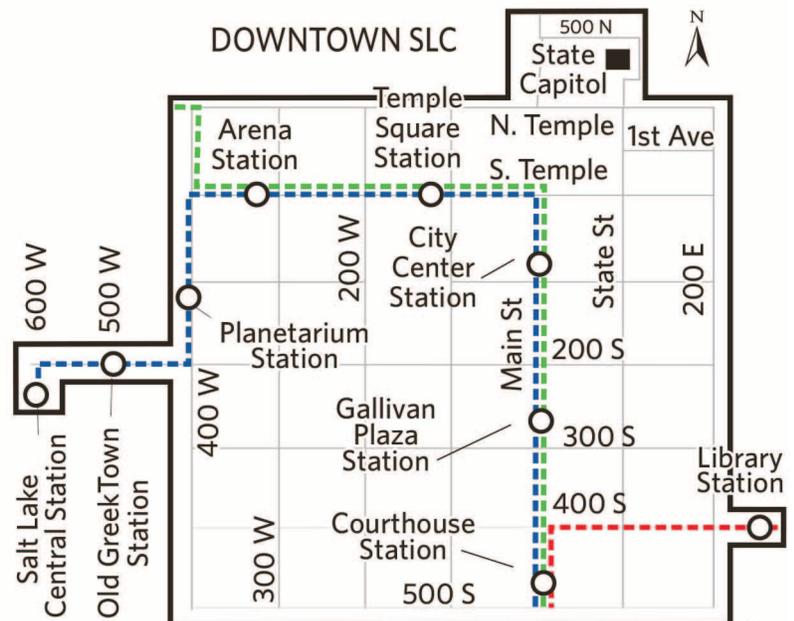
This year’s awards banquet will be held in the rotunda at the Utah State Capitol. This amazing space is truly awe inspiring - you won’t want to miss it. Meet in the Little America valet area for transportation to the Capitol. Buses will start a continuous loop at 5:45 for the ten minute trip. Hors d’oeuvres and dinner will be served prior to the awards ceremony and installation of officers.



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