



2023 Annual Conference Schedule

August 14-16 • Salt Lake City, Utah

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



Speaker/Topic	Description	Class Hours	CPFA Points	ACPPA Points	Points Earned
Monday, August 14 8:30-9:30 am MT Opening Keynote How to Turn Complainers into Collaborators Will Bowens (Recorded)	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.	1.0	.5	0.0	
Monday, August 14 9:45-10:45 am MT Understanding the Layers of Card Processing to Protect Your Budget Casey Leloux, Intellipay (Recorded)	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.	1.0	.5	1.0	
CONCURRENT SESSION Monday, August 14 11:00 am – Noon MT Investment Decisions – Best Practices and Real World Case Studies Jason Click and Jason Headings, Meeder Public Funds (Recorded)	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.	1.0	.5	1.0	
CONCURRENT SESSION Monday, August 14 11:00 am-Noon MT Utilizing Tax-Exempt Trusts for Retention, Recruiting and OPEB Reduction Joel 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.				
Monday, August 14 1:00-2:00 pm MT First Amendment Audits Jason Watterson, Utah Local Government Trust (Recorded)	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.	1.0	.5	1.0	
CONCURRENT SESSION Monday, August 14 2:15-3:15 pm MT Municipal Market Overview Peter Stettler, Piper Sandler (Recorded)	This presentation will discuss current economic trends and what they may mean for both municipal investors and issuers as well as municipal credit quality. Includes review of recent changes in rating agency methodology affecting cities and counties.	1.0	.5	0.0	
CONCURRENT SESSION Monday, August 14 2:15-3:15 pm MT Treasurer-to-Treasurer	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.			0.0	



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Monday, August 14 3:30-4:30 pm MT Challenges of the Modern Workplace P. Corper James, Mabey Wright & James (Recorded)	Retention in a labor shortage and hiring for fit, all while managing the classic state and federal employment laws.	1.0	.5	0.0	
Tuesday, August 15 8:30-9:30 am MT Becoming Rock Star Leaders Jonathan Baker, Zions Bancorporation (Recorded)	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.	1.0	.5	0.0	
CONCURRENT SESSION Tuesday, August 15 9:45-10:45 am MT Everything You Wanted to Know about Chat GPT but were afraid to ask Greg Prost, Robinson Capital (Recorded)	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.	1.0	.5	0.0	
CONCURRENT SESSION Tuesday, August 15 9:45-10:45 am MT GASB Update Anthony Cervini, 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).			1.0	
Tuesday, August 15 10 am; 10:45 am; 11:30 am OFF-SITE Federal Bank Tours	The Utah branch of the Federal Reserve Bank will provide an inside look at their operations. Please note attendees are limited and you must sign up prior to the tour and be able to travel to the bank	.5	.25	0.0	
Tuesday, August 15 11:00 am – Noon MT Social Media for Public Treasurers: Opportunities, Challenges and Tools Brittany Griffin, Utah Office of the State Treasurer (Recorded)	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.	1.0	.5	0.0	



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Tuesday, August 15 1:00-2:00 pm MT Creating Resilience and Maturity to Defend Cybersecurity Threats Rick Gardner, Cybersecurity and Infrastructure Security Agency (Recorded)	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.	1.0	.5	0.0	
CONCURRENT SESSION Tuesday, August 15 2:15-3:15 pm MT Embrace the Power of Technology John Melvin, US Bank (Recorded)	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.	1.0	.5	1.0	
CONCURRENT SESSION Tuesday, August 15 2:15-3:15 pm MT Common Mistakes in Managing Fixed Income Portfolios Chris Nicholl, 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.				
Tuesday, August 15 3:30-4:30 pm MT Economic Update Scott Burnett, Zions Capital Advisors (Recorded)	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.	1.0	.5	1.0	
Wednesday, August 16 8:30-9:30 am MT Fraud, Corruption and Running the Gamut of Bad Behavior Steward Young, US States Attorney's Office – District of Utah (Recorded)	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 cover a wide array of criminal behavior, including crimes relating to payment schemes, ransomware, and other concerns typically faced by public entities.	1.0	.5	0.0	



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Wednesday, August 16 9:45-10:45 am MT The Opioid Epidemic Christian Mickelsen, DEA Task Force, IRS (Recorded)	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.	1.0	.5	0.0	
Wednesday, August 16 11:00 am – Noon MT CLOSING KEYNOTE Ethics: Nobody Needs It... Until They Get Caught Dr. Dale Henry	No one really gets hurts 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.	1.0	.5	0.0	
Wednesday, August 16 1:00-6:00 pm MT ACPFIM Training Greg Prost	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	