



2023 Annual Conference

Association of Public Treasurers of the United States & Canada

In Partnership with the Utah Association of Public Treasurers

Speaker Biographies



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

GRIPE: How to Turn Complainers Into Collaborators

Will Bowen – Opening Keynote Speaker

Will Bowen is founder of the Complaint Free movement with over 15 million followers worldwide.

Will's been featured on Oprah, Forbes, NBC's Today Show, CBS Sunday Morning, the ABC World News, People, Newsweek, The Wall Street Journal, and Chicken Soup for the Soul.

In July 2006, Will handed out 250 purple rubber bracelets inviting people to use them as a tool to stop complaining. His idea exploded around the world, and, to date, more than 15 million of his purple Complaint Free bracelets have been distributed to people in 106 countries.

Will is a humorous motivational speaker, a #1 international best-selling author, a multi #1 Amazon best-selling author, an award-winning trainer, the 2016 Purdue University Executive in Residence, and he's the World Authority on Complaining – why people complain, what's wrong complaining, and how to get ourselves and others to stop.



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

Understanding the Layers of Card Processing to Protect Your Budget

Casey Leloux, CEO, Intellipay

Casey Leloux is the Chief Executive Officer of Intellipay. He has a passion for technology, software, and leading Fintech companies into the new digital frontier. He has over eighteen years of payment industry experience and extensive knowledge of payment processing. He will be sharing his expertise on "Understanding the Layers of Card Processing to Protect Your Budget."



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Monday, 11:00 am - Noon • Breakout Session • Ballroom A

Utilizing Tax-Exempt Trusts for Retention, Recruiting, and OPEB Reduction

Joel J. Babbitt, NPPFA Benefits Group

Joel Babbitt has been active and licensed to do business for over 30 years, 25 of which at the firm he founded. Joel holds both FINRA Series 6 and 63 licenses. Joel created for the National Public Pension Fund Association (NPPFA) the Wise Choice co-op sponsored by the non-profit NPPFA. The co-op includes 457(b) Wise Choice for Public Employees® Plan, the Retirement Healthcare Funding Plan, the Wise Choice 401(a) Plan, and the Wise Choice for Educators® 403(b)/457(b) Plan.

Joel is the administrator of the program and works out of the Chicago office. He is responsible for the day-to-day operation of a plan with over 240 participating units of government, 14,000+ participants, and over \$650 million in assets under management.



Monday, 11:00 am - Noon • Breakout Session • Ballroom B/C

Investments – Inflation and Fed Policy

Jason Click, President and Jason Headings, Sr. VP, Meeder Investment

Jason Click is President of Public Funds with Meeder Investment Management. With over 20 years of investment management experience, Jason is a Certified Financial Planner. He is a member of the firm's Executive Management Team, where he is responsible for the management and strategic direction of the Public Funds. In addition to departmental oversight, he is directly involved in the client management of many of the firm's high-profile clients. Jason has served in various management roles within the investment industry throughout his career and he is a frequent speaker at various industry conferences, as well as a published industry contributor.



Jason Headings is the Senior Vice President with the firm. He is a Chartered Market Technician and brings more than a decade of investment industry experience, including a deep knowledge of investing in the public funds space. Additionally, Jason has won numerous awards for his work on the Meeder Money Market Fund.



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

First Amendment Audits

Jason A. Watterson, Loss Prevention Consultant, Utah Local Governments Trust

Jason Watterson is a Loss Prevention Consultant with the Utah Local Governments Trust. He helps more than 500 local government agencies in Utah effectively manage their risks.

He is a Certified Industrial Hygienist, Certified Hazardous Materials Manager and has degrees in Public Health and Biology from Utah State University. Jason also holds the Associate in Risk Management for Public Entities.

Jason has extensive experience in environmental, health and safety management, and has served in site and corporate positions in the electronics and manufacturing sectors, including managing large industrial wastewater operations and large quantity hazardous waste facilities. Jason was the Risk Manager for all mountain venues for the Salt Lake 2002 Winter Olympic Games. He lives on his family's ancestral ranch in Cache Valley, Utah with his wife Kimberley and five children where he enjoys ranching, helping with the family outfitting business and worrying.



Monday, 2:15 pm - 3:15 pm • Breakout Session • Ballroom B/C

Municipal Market Update

Peter Stettler, Director, Municipal Credit Analyst, Piper Sandler

Peter Stettler is the Director and Municipal Credit Analyst with Piper Sandler. An award-winning analyst, Peter brings 25 years of experience in credit research and consulting to Piper Sandler, where he supports the firm's sales and public finance efforts by focusing on general credit issues affecting the market. Prior to joining Piper Sandler, Peter worked in the municipal research department of two investment banks, BMO Capital Markets GKST, Inc. and EVEREN Securities, Inc.; as well as the tax-supported and transportation groups at Fitch Ratings.

At Piper Sandler, Peter is their Municipal Credit Analyst and oversees the publication of the firm's quarterly Relative States and State of State reports and has provided rating strategy support to numerous public finance clients at Piper Sandler.



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

Challenges of the Modern Workspace

P. Corper James, Mabey Wright & James, PLLC

Corper James practices employment law with an emphasis on employment discrimination and Title VII Civil Rights Act of 1964. Corper advises clients regarding federal and state employment laws and specializes in providing training and prevention programs for businesses and organizations focusing on effective management techniques. Corper also represents plaintiffs in discrimination and harassment cases.

Corper is the co-author of *The Opportunity of Workplace Diversity: Theory, Cases, and Exercises*. He is also the author of several training programs designed to assist businesses and organizations in preventing and dealing effectively with workplace conflicts. Corper has litigation experience in all employment areas including Title VII protected classes, the American's with Disabilities Act, the Age Discrimination in Employment Act, and employment-related state law tort claims. Corper is an experienced trainer and speaker on such issues as Title VII sexual harassment, employee handbooks, proper interview, discipline and termination procedures, workplace diversity, and the family Medical Leave Act, Fair Labor Standards Act, ADA and ADEA. Corper trains a wide range of businesses and organizations including corporate clients, police officers, fire fighters, small businesses, doctors, and lawyers. Corper represents state and national employers, as well as plaintiffs in employment cases.

He is currently an Adjunct Professor at the University of Utah, where he teaches a Civil Rights Law/Employment Discrimination class. Prior to joining Mabey Wright & James, Corper was a shareholder at the Salt Lake City firm of Woodbury & Kesler. Corper studied literature as an undergraduate at the University of Utah and attended law school in both San Francisco and Berkeley, California.

Corper is an avid football fan and worked as an in-house Law Clerk for the Oakland Raiders from 1999 to 2000. He also worked as a certified teacher in the San Francisco Unified School District prior to attending law school and has worked with several inner-city programs focusing on troubled youth and access to community resources for immigrant families. Corper is active in local community affairs and politics and is the former President and current member of the Board of Directors for Centro de la Familia in Salt Lake City, a large federally funded organization that focuses on head start and early education for rural families, including migrant-worker families.



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

Becoming Rock Star Leaders

Jonathan Baker, Senior VP, Zions Bancorporation

Jonathan Baker is the Senior Vice President of Zions Bancorporation. He joined Zions Bank during the summer of 2001 in the Cash Management and Corporate Relations department. Since that time, he has specialized in Treasury Management, Government Banking, and Municipal Finance.

Jon currently leads a national team of relationship managers who specialize in direct purchases of municipal debt. He has led numerous teams in banking and at several non-profit groups in Salt Lake City. He is a strong believer that for any organization to succeed, there must be a focus on developing leadership qualities in all stakeholders, not just managers. Jon is also a high school mountain bike coach and uses the same leadership principles to help new riders gain confidence and begin racing.

Jon resides in Farmington, Utah with his wife and three teenage children. Jon's passions include playing guitar in a rock band, long distance triathlon racing, and public speaking.



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

Everything You Want to Know About Chat GPT, but were afraid to ask

Greg Prost, CIO, Robinson Capital Management

Greg Prost is the Chief Investment Officer of the Traditional Fixed Income Group at Robinson Capital. He has over 30 years of experience investing in the bond market and oversees the core fixed income operation, including directing fixed income strategy and managing institutional portfolios.

Greg is a Chartered Financial Analyst (CFA), a frequent speaker to Michigan municipal organizations and is a member of the MMTA, MGFOA and the MACT. He is also the Chair and Instructor for APT US&C's Certified Public Funds Investment Manager (CPFIM) and Advanced CPFIM certification program. Greg holds an MBA from Western Michigan University and a BA in Economics from Kalamazoo College.



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GASB Update – What You Need to Know

Anthony M. Cervini, CPA, Government Services, Sikich LLP

Anthony Cervini is a CPA in the Government Services Division of Sikich, LLP. He is responsible for providing technical services to Sikich's governmental clients in all areas of governmental accounting, auditing, financial reporting, budget development, internal controls, revenue and expenditure forecasting, and cash and debt management.

Anthony has participated in hundreds of audits of municipalities and other governmental entities since beginning his career with Sikich in 2005. He also has been responsible for serving as lead instructor for governmental accounting, auditing, financial reporting, cash management, and internal control courses internally and throughout the Midwest.

Anthony serves as a member of the Government Finance Officers Association (GFOA) Special Review Committee and is the current Chair of the Illinois CPA Society Government Report Review Committee. He previously served as a budget reviewer for the GFOA Distinguished Budget Presentation Award.



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

Social Media for Public Treasurers: Opportunities/Challenges/Tools

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

Brittany Griffin is the Policy and Communications Deputy with the Utah Office of State Treasurer.

Her background is in public administration, policy, and communications. She is currently the policy and communications deputy for the state treasurer of Utah. Her prior experience includes working in local government, academia, marketing, and television news. Brittany has set up and managed social media accounts for multiple governmental entities, local news media outlets, and small businesses. Brittany completed her doctorate in public policy and administration and is a foster and adoptive mom.



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

Creating Resilience and Maturity to Defend Cybersecurity Threats

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

Rick Gardner serves as the Utah Cyber Security Advisor (CSA) for the Integrated Operations Division (IOD) of the Cybersecurity and Infrastructure Security Agency (CISA). He supports the Department of Homeland Security (DHS) mission of strengthening the security and resilience of the nation's critical infrastructure. His daily responsibilities include coordinating cyber preparedness information sharing and collaboration, risk mitigation and incident response, and providing cybersecurity resources, including providing assessments.

Rick Gardner has over 24 years working as a professional in Information Technology, to include his previous assignment as the Utah Army National Guard (UTARNG), Deputy Chief Information Officer CIO/G6 which he successfully fulfilled for over six years.

Chief Gardner has served in the Military for the past 28 years and is currently serving as a CW4 Senior Team Chief for the UTARNG Defensive Cyber Operations Element (DCOE). In this capacity he is responsible for planning, supervising, coordinating and providing technical assistance for defensive cyberspace operations. He is a subject matter expert for managing cyber incident response activities with state and local government, industry partners, and for inquiries from other National Guard / Department of Homeland Security / ACOIC and other government agencies.

Rick Gardner has numerous IT/Cyber Certifications including: Certified Information System Security Professional (CISSP), Certified Information Systems Auditor (CISA), Certified Ethical Hacker (CEH), 4EA IT Infrastructure Library (ITIL) Certifications, Project Management Professional (PMP), and Microsoft Certified System Engineer (MCSE).

Mr. Gardner has earned a Master of Science, Chief Information Officer Degree from the National Defense University, and a Bachelor of Science, Information Technology Degree from Bellevue University.



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Tuesday, 2:15 pm - 3:15 pm • Breakout Session • Ballroom B/C

Embrace the Power of Technology

John Melvin, VP, Working Capital Consultant, US Bank

John Melvin is a member of US Bank's Working Capital Consulting team. With more than 25 years of treasury management experience, John provides strategic leadership, business process re-engineering, change management expertise and thought leadership to numerous industry segments with the aim of reducing costs and improving liquidity. He also works with the bank's payments innovation lab to enhance and revolutionize payment and data streams. Through agile discussions, clients and prospects are engaged to reform the end-user experience. John joined U.S. Bank in 2012 as a team lead for the 11-state Mid-Mountain Team, providing working capital solutions for mid-market companies and government entities. He's been a Minneapolis-based working capital consultant at the bank since 2015.

John has published numerous articles regarding payment strategies and operational enhancements for receivables, payables and liquidity management. He has also presented at a number of industry events sponsored by the Association for Financial Professionals (AFP).



Tuesday, 2:15 pm - 3:15 pm • Breakout Session • Ballroom A

Common Mistakes in Managing Fixed Income Portfolios

Chris Nicholl, Senior Portfolio Manager, Hilltop Securities

Chris Nicholl is the managing director and senior portfolio manager with Hilltop Securities. He specializes in fixed income investment management. He joined Hilltop Securities in 2022 and is responsible for analyzing securities and structuring fixed income portfolios, advising institutional and individual investors on fixed income market landscape and opportunities, designing and advising on investment policies, portfolio strategy, executing trades and maintaining broker-dealer relationships. Chris also collaborates with clients on a consultative basis to develop and implement investment strategies.

Chris earned his MBA from Rutgers University Graduate School of Management and his Bachelor of Arts in Economics and English from Rutgers University.



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The Economy, The FED and Interest Rates

Scott Burnett, President, Zions Capital Advisors

Scott Burnett is President of Zions Capital Advisors and director of fixed-income strategies.

Scott has more than 42 years trading, sales and managerial experience in capital markets and the financial services industry. He also has extensive experience in municipal securities underwriting and trading.

Scott earned his Bachelor of Science Degree from Brigham Young University.



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

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

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

While maintaining a full caseload, Stewart also serves as the Training Officer for federal prosecutors at the National Advocacy Center in South Carolina, along with lecturing at various trainings around the state and region for both attorneys and law enforcement agents.

From July 2017 to February 2020, Stewart served as the Senior Litigation Counsel in the District of Utah. In this role, he trained criminal AUSAs and federal/task agents in the District of Utah, and provided counsel to the U.S. Attorney on violent street gangs and crime reduction initiatives. He also designed and implemented several large-scale programs at the U.S. Attorney's direction targeting violent street gangs and Mexican cartels.

Stewart is a graduate of Stanford Law School, with a master's degree in International Relations from Waseda University in Tokyo, Japan, and an undergraduate degree from Princeton University.



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

The Opioid Epidemic

Christian Mickelsen, DEA Task Force, IRS

Christian Mickelson was hired as a special agent for IRS Criminal Investigation in 2000. He spent ten years in Las Vegas before being transferred to his hometown of Salt Lake City.

For the past 18 years, Christian has been detailed to the Drug Enforcement Administration and assigned to the Organized Crime Drug Enforcement Task Force and High Intensity Drug Trafficking Area task force. He has conducted hundreds of investigations involving the illegal distribution of all sorts of drugs to include opioids and complex money laundering schemes involving the drug proceeds generated from the distribution of drugs. Christian recently obtained certifications from the Association of Certified Anti-Money Laundering Specialists (ACAMS) and the Association of Certified Financial Crimes Specialists (ACFCS) to expand and fine tune his investigative skills. In his free time, Christian enjoys spending time with his daughter, rock crawling in his Jeep, and playing competitive baseball.



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

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

Dr. Dale Henry, Closing Keynote Speaker

Dr. Dale grew up in the foothills of the Smoky Mountains, an area that is bountiful in two things – hospitality and story-telling.

Dr. Dale has been a teacher, principal, Dean of the oldest college in Tennessee, a businessman, author, and a speaker and trainer. He has been in customer service over half his life. His story-telling ability propelled him as a teacher. This, combined with his customer service and unique ability to captivate audiences, has sky-rocketed Dale in his speaking career. Since he began speaking, corporate, government, and educational agencies call on Dr. Dale regularly to have him train their professionals. His client list is a virtual who's who of the top business and agencies in the nation. Dr. Dale is a master teacher in every aspect of the term, and he is what motivational speakers aspire to become.

In keeping with Dr. Dale Henry's book title, *The Proverbial Cracker Jack: How to Get Out of The Box And Become The Prize*, Dr. Dale is definitely the prize!