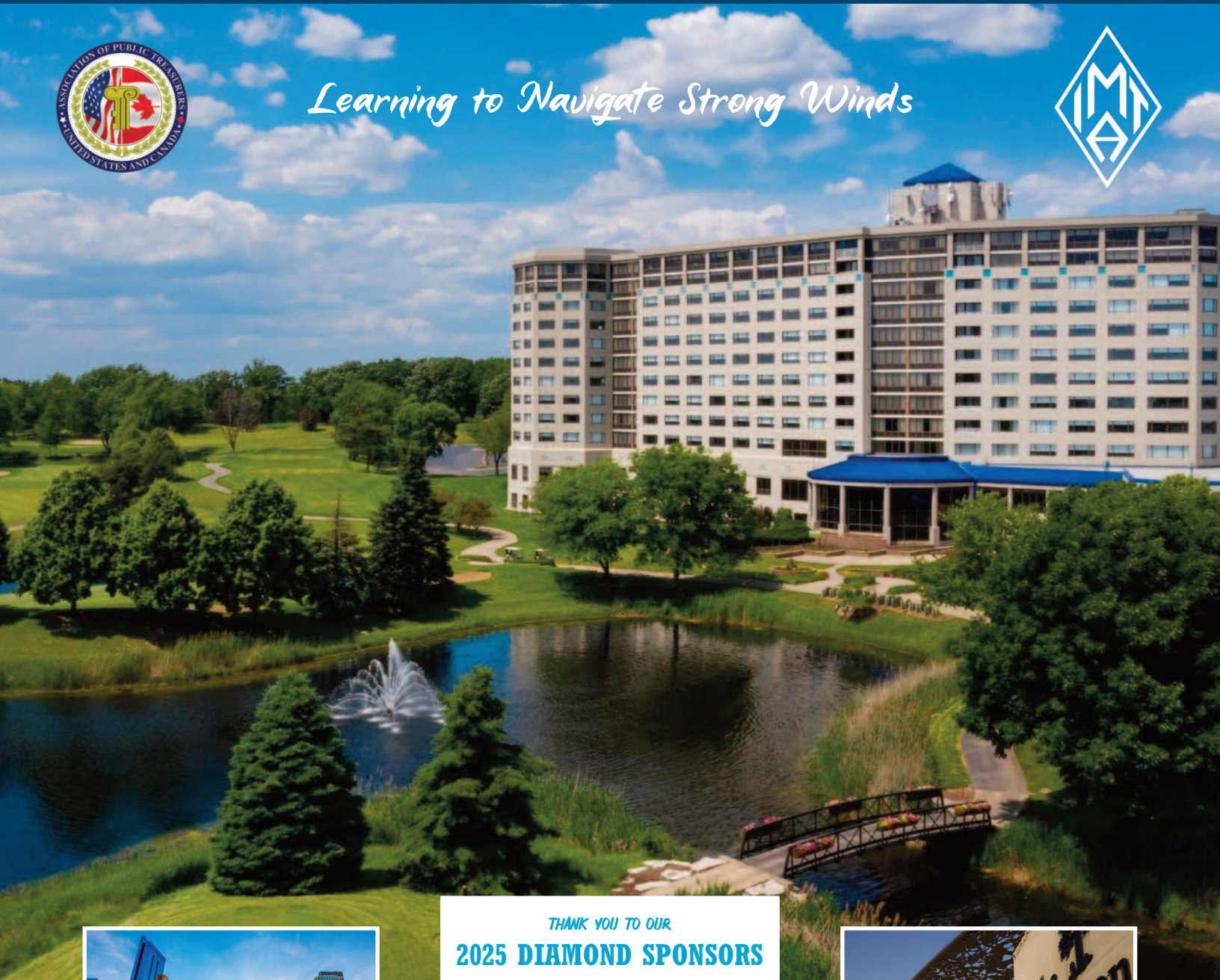


# APT US&C 59<sup>TH</sup> ANNUAL CONFERENCE

JULY 20-23, 2025 • OAK BROOK HILLS/CHICAGO HILTON RESORT • ILLINOIS



*Learning to Navigate Strong Winds*



THANK YOU TO OUR  
**2025 DIAMOND SPONSORS**



**Association of Public Treasurers of the United States & Canada**

in Partnership with the Illinois Municipal Treasurers Association



# Invest in tomorrow, today.

Meeder Public Funds understands that sound, long-term investments can benefit your portfolio and the communities you serve.

We bring 3+ decades of experience delivering solutions to help local governments, institutions, and non-profits achieve financial goals with confidence. Let's partner to create a custom investment program for you, as we have for 450+ others.

- » Fixed Income Solutions
- » Liquidity Management
- » Customized Investment Strategies
- » Risk Management & Compliance

Whether you're focused on short-term liquidity or long-term growth, our team helps ensure your investment strategy is aligned with your mission.

**LET'S MAKE A DIFFERENCE TOGETHER.  
REACH OUT TODAY FOR A CONVERSATION.**

866.633.3371 | [meederpublicfunds.com](https://meederpublicfunds.com)





# APT US&C 59<sup>TH</sup> ANNUAL CONFERENCE PROGRAM GUIDE

JULY 20-23, 2025 • OAK BROOK HILLS/CHICAGO HILTON RESORT • ILLINOIS

## Table of Contents

President’s Welcome ..... 2

Conference Schedule ..... 14-15 (center of guide)

Sponsors & Exhibitors

    Diamond Sponsor ..... 4

    Platinum Sponsor ..... 4

    Gold Sponsors ..... 6-7

    Meal Sponsors ..... 8

    Exhibitors ..... 8-9

    Supporters ..... 10

Speakers & Topics ..... 16-26

Special Event Overview ..... Inside Back Cover

2026 Annual Conference Save the Date ..... Back Cover

## Welcome to Chicago

Welcome to the Oak Brook Hills Resort just outside Chicago, Illinois in the beautiful suburbs of DuPage County. The Resort and Conference Center are surrounded by a serene 150-acre estate that includes the Audubon-certified 18-hole Willow Crest Golf Club. The resort features an outdoor pool, tennis, basketball, and volleyball courts, a spa, two golf simulators, and two restaurants. Additional shopping and dining are just a short drive away in the surrounding Village of Oak Brook (see more details on the inside back cover).

While there is plenty to do here in the suburbs, there’s also time to go into the City, most notably before the conference and on Monday evening, after the exhibitor reception. Chicago is among the largest cities in the U.S. and has been voted as Best Big City in the country for eight years in a row by Condé Nast Traveler. The city boasts a skyline punctuated by skyscrapers such as the iconic John Hancock Center, the 1,451-ft. Willis Tower (formerly the Sears Tower) and the neo-Gothic Tribune Tower. The city is renowned for its museums, sports, culture, shopping, and lakefront vistas. An FYI for baseball fans: the Chicago Cubs are hosting the Boston Red Sox the Friday-Sunday before the conference and the Kansas City Royals during the conference.

For music, theater, tours, festival and other events and tickets, check out the Choose Chicago website at [choosechicago.com](http://choosechicago.com). Have a wonderful time sampling what the conference and the surrounding areas offer!



# PRESIDENT'S MESSAGE

Welcome to our 59<sup>th</sup> Annual Conference! We're so happy to be in the Oak Brook/Chicago area in partnership with our state affiliate, the Illinois Municipal Treasurers Association (IMTA).

This year's conference theme is "Learning to Navigate Strong Winds" which is a nod to the Windy City and obvious to anyone who heads downtown and feels those winds coming off of Lake Michigan. But we all deal with strong winds in our personal and professional lives: change and challenges, new requirements and processes, new people, and updates in methods and procedures. Whether we feel it from the federal level or from local citizen's concerns, or everything in between, APT US&C is here to help. I have been so proud of our 2024-25 Board of Directors for working hard to provide leadership, training, networking, insight, and guidance to make sure we have the answers treasury professionals need.



As an organization, we continue to focus on the relationships that guide us to our success. The teamwork and dedication between APT US&C and the IMTA in planning and implementing this year's joint conference has been fantastic to witness. We couldn't be more thrilled by IMTA's support and hospitality. A special thanks to our joint Annual Conference Chairs, Erin Crawford and Beckey Kijak, as well as the planning committee members. Your imagination and dedication are amazing!

We continue to attend state affiliate conferences to listen, share, and learn your successes and challenges. We appreciate your welcome attitudes, spirit of sharing, and genuine kindness when we visit and learn more about each of your states. We also remain grateful for the involvement and support of our corporate members and sponsors - you are all vital to our success during this conference and throughout the year. I encourage you to spend lots of time in the Exhibit Hall getting to know our vendors. Don't miss the Exhibitor Reception on Monday afternoon!

Please take the time to review the APT US&C Annual Report for an overview of all our shared accomplishments this past year. The Annual Report will be distributed at Tuesday's Annual Meeting and is on our website, [APTUSC.org](http://APTUSC.org). And definitely make sure to join us at this year's Joint Awards Ceremony on Tuesday evening - I can't wait to see the Moreton Arboretum - I've heard it's beautiful.

I have been blessed to serve on the Board of Directors and as your President. What I've learned and who I've met has made an incredibly meaningful impact on me and I truly wish that I've shared that with all of the people I've worked with during my time on the Board. I thank you for the honor and the privilege of serving as the APT US&C President. The experience has helped me to *learn how to navigate strong winds* and I hope I've shared that with you, too.

Best Always,

A handwritten signature in purple ink that reads "Vicki Kitchen". The signature is fluid and cursive.

Vicki Kitchen  
APT US&C President  
Clerk/Treasurer, Town of North Liberty, Indiana



## Empowering Public Fund Investors

At Baird, we believe that public fund investors deserve more than just investment solutions; they deserve a trusted partner committed to education, collaboration, and stewardship.

### Baird's Public Fund Group

[bairdfixedincome@rwbaird.com](mailto:bairdfixedincome@rwbaird.com)

Kevin Webb, Managing Director

Ben Finkelstein, Managing Director

David Carr, Director

John Daniel, Director

Discover the *Baird Difference*



We Make Banking Easy

## Largest Lockbox Service in Downstate Illinois.

Streamline payment processing with INB's Lockbox Service. We handle customer payments, capture remittance data, and securely transmit it to you—saving time and improving cash flow. Scalable for businesses, government, healthcare, and nonprofits, our service is efficient, affordable, and customized to your needs. We also offer credit card authorization and settlement options.

Want a faster, easier way to manage payments?  
**INB does the work for you.**

Contact our Business Solutions team at 877-771-2316.

[www.inb.com](http://www.inb.com)

322 E. Capitol Avenue, Springfield, IL 62701

# CONFERENCE SPONSORS

## Diamond Sponsor

### Meeder Investments and IMET

[meederinvestment.com/public-funds](https://meederinvestment.com/public-funds) • [investimet.com](https://investimet.com)

Jason Click • [jclick@meederinvestment.com](mailto:jclick@meederinvestment.com) • 614-760-2120

Sofia Anastopoulos • [sofia.ana@investimet.com](mailto:sofia.ana@investimet.com) • 708-356-7333

Meeder Public Funds has served public entities since 1990. As of December 31, 2024, MPF had assets under advisement of over \$165 billion for public entities. Assets Under Advisement consist of \$59.25 billion of regulatory assets under management and \$107.75 billion of non-discretionary assets as to which the adviser provides strategic advice or consultation. Meeder works with more than 400 public entities across the country, creating customized investment solutions for states, counties, cities, schools, townships, libraries, higher education, and special districts.



The Illinois Metropolitan Investment Fund (IMET) is a local government investment pool established to serve Illinois public agencies. IMET offers two investment vehicles: the IMET Core Fund and the IMET Convenience Fund. These funds are designed for finance officers, treasurers, and other official custodians of public funds throughout the state. In addition to the funds, IMET provides participants with access to investment tools and services to support their financial programs. These include separately managed accounts (SMAs) through Meeder Investment Management, arbitrage rebate calculation services for bond proceeds, and access to DebtBook - an online platform for managing debt, leases, and subscription-based assets. IMET also offers a simplified cash flow forecasting tool to help identify portfolio liquidity and optimize earnings.



## Platinum Sponsor

### State of Illinois Treasury Department

[illinoistreasurer.gov](https://illinoistreasurer.gov)

Erin Slone • [eslone@illinoistreasurer.gov](mailto:eslone@illinoistreasurer.gov) • 312-814-3624

The Illinois Funds lets government agencies use the Illinois State Treasurer's resources to safely invest their funds while enjoying the economies of scale available from a \$19+ billion pooled fund investment portfolio. The Illinois Funds' investment objectives are, in priority order: (1) safety of principal; (2) maintaining sufficient liquidity to ensure that investors have immediate access to funds; and (3) providing a competitive rate of return relative to comparable investment options. Additional benefits include:

- Investments can be overnight or long-term.
- The Illinois Funds complements local banking relationships.
- No minimum investment is required.
- Free online account access to view transaction history, perform financial transactions, including account inquiries, transfers, purchases, and redemptions.
- Money cannot be swept by the General Assembly or used for any other purpose.
- Government agencies participating in ePAY under The Illinois Funds will have their funds deposited into their Illinois Funds investment account(s) daily.
- Since 1996, The Illinois Funds has annually received the highest prime investment grade for a government-managed money market fund. Currently, The Illinois Funds is rated AA+mmf by Fitch Ratings, Inc.







# Why invest in **IMET**?

Since 1996, IMET, created under the Intergovernmental Cooperation Act, has provided Illinois public agencies with safe, liquid, and attractive investment alternatives.



**IMET**

ILLINOIS METROPOLITAN  
INVESTMENT FUND

**INVESTING TOGETHER FOR OUR COMMUNITIES**

**IceMiller**  
LEGAL COUNSEL

 **DebtBook**

**MuniCast<sup>®</sup>**  
Financial Models

 **MEEDER**  
PUBLIC FUNDS

**[www.investIMET.com](http://www.investIMET.com)**

# CONFERENCE GOLD SPONSORS

## BS&A Software

**bsasoftware.com**

Kevin Schafer • [kschafer@bsasoftware.com](mailto:kschafer@bsasoftware.com) • 517-641-8900

BS&A Software has been providing exceptional municipal software to over 2,100 local governments since 1987. Their software solutions make it easy to manage and operate all aspects of municipal budgets, taxes assessments, ordinance, contracts, construction, licenses, and much more. With an intuitive and highly functional platform, unparalleled customer care, and Cloud-Based functionality, BS&A's municipal software solutions continue to exceed customers' expectations.



## Corpay

**corpay.com**

Michael Doerr • [mdoerr@paymerang.com](mailto:mdoerr@paymerang.com) • 804-840-6516

Corpay empowers businesses to be smarter in making and managing payments. With bank- and ERP-agnostic integrations, we enable companies to increase efficiency, minimize payment risks, and reduce costs. As an S&P 500 company, our AP automation and commercial card solutions improve financial controls and visibility on one end-to-end platform.



## Hilltop Securities

**hilltopsecurities.com**

Mica Owens • [mica.owens-weary@hilltopsecurities.com](mailto:mica.owens-weary@hilltopsecurities.com) • 469.830.2268

Hilltop Securities is a full-service municipal investment bank and wealth advisory firm providing financial services for public entities, institutional investors, housing finance agencies, broker-dealers, and individual investors. Founded in 1946, Hilltop Securities' primary areas of focus include public finance, capital markets, structured finance, retail brokerage, clearing services, and securities lending. Member: NYSE/FINRA/SIPC.



## Moreton Asset Management

**moretonadvisors.com**

Jason Williams • [Jason@moretonadvisors.com](mailto:Jason@moretonadvisors.com) • 801-869-4200

Moreton Asset Management is a registered investment advisor (RIA) with the Securities and Exchange Commission (SEC)\*. Moreton Asset Management, LLC offers customized money market and fixed-income portfolio management for institutional clients. Expertise includes investment and risk management capabilities with exceptional client service, in-depth consultation and extensive interaction between clients and the investment team. Moreton specializes in portfolios that have significant regulatory needs. Clients include state and local governments, credit unions, community banks, and corporations.



## National Public Pension Fund Association

**nppfa.org**

Joel Babbitt • [joelb@nppfabenefits.org](mailto:joelb@nppfabenefits.org) • 773-427-2060

NPPFA Benefits exclusively provides the education, sales, and marketing for the NPPFA 457(b) Wise Choice for Public Employees® Plan, the Retirement Healthcare Funding Plan/115 Trust, and the Wise Choice for Educators® 403(b)/457(b) Plan.





# CONFERENCE GOLD SPONSORS

## PTMA Financial Solutions

**pmanetwork.com • publictrustadvisors.com**

Steve Adams • [sadams@pmanetwork.com](mailto:sadams@pmanetwork.com) • 618-230-8051

PTMA Financial Solutions, an affiliate of Public Trust Advisors, LLC and the PMA Companies, provides a comprehensive platform of treasury, cash, and liquidity management solutions, in addition to municipal advisory and other financial products and services to public entities and financial institutions nationwide.



## PayIt

**payitgov.com**

Steve Moerbe • [smoerbe@payitgov.com](mailto:smoerbe@payitgov.com) • 800-268-9153

PayIt enables state and local government agencies to deliver a great resident payments experience that accelerates the shift to digital. Agencies choose PayIt to better achieve their mission through improved operational efficiency, customer support, and resident satisfaction. Our solutions span property tax, courts, utilities, DMV, outdoors, and more. PayIt provides a single resident profile across agencies and jurisdictions, integrates into back-office and adjacent systems, and our team helps clients drive adoption of digital channels. Serving more than 100 million residents in North America, we have received awards from Fast Company and StateScoop, and have been listed in the GovTech 100 for 9 years and counting.



## Robinson Capital Management

**robinsonfunds.com**

Greg Prost • [gprost@robinsonfunds.com](mailto:gprost@robinsonfunds.com) • 313-821-7705

Robinson Capital is an independent investment advisor specialized in developing traditional and alternative fixed income solutions for public institutions. Our investment approach employs both fundamental and value techniques to best identify positive risk/reward opportunities and to maintain a consistent and disciplined approach.



## WinTrust Government Funds

**wintrust.com**

Aimee Briles • [abriles@wintrust.com](mailto:abriles@wintrust.com) • 630-560-2120

An expert in providing the financial services local government entities require. Featuring professionals who focus exclusively on public sector clients, including municipalities, school districts, fire districts, sanitary districts, park districts, counties, and libraries. Services are offered through local Wintrust Community Bank locations, and include flexible financing structures, customizable treasury management solutions, investment options and Government specific accounts, including the MaxSafe™ Public Fund accounts (up to 16 times the typical FDIC insurance coverage). Best of all, as a group of community banks, taxpayer funds are kept locally and reinvested back into local communities.



# CONFERENCE SPONSORS

## Meal Sponsors

### Baird • [rwbaird.com](http://rwbaird.com)

David Carr • [dcarr@rwbaird.com](mailto:dcarr@rwbaird.com) • 805-630-3873

At Baird, we believe that public fund investors deserve more than just investment solutions; they deserve a trusted partner committed to education, collaboration, and stewardship. Our Public Funds Group is dedicated to supporting public entities in navigating the complex world of fixed income investing, with a particular emphasis on principal preservation.



### INB • [inb.com](http://inb.com)

Katie Hahn • [khahn@inb.com](mailto:khahn@inb.com) • 217-747-8603

INB, N.A. is a privately owned national bank. Founded in 1999 in Springfield, Illinois, the bank offers both personal and commercial banking products and wealth services in Central Illinois and has a full-service branch in Tampa, Florida. The bank also provides commercial banking services out of St. Louis, Missouri and Miami, Florida.



## Exhibitors

### Andrews Technology • [andrewstechnology.com](http://andrewstechnology.com)

Ciarra Self • [ciarra@andrewstechnology.com](mailto:ciarra@andrewstechnology.com) • 910-742-5053

Andrews Technology has over 20 years of successfully providing leading-edge time and attendance solutions to organizations having 50 to 50,000 employees. With many technology options, we can provide the solutions, customer service, and training you need to function accurately and efficiently. We proudly partner with BS&A Software.



### Azavar • [azavar.com](http://azavar.com)

Tom Fagan • [tfagan@azavar.com](mailto:tfagan@azavar.com) • 708-997-0528

Azavar Government Solutions is a contingent-based service that helps municipalities maximize all their revenue streams by doing a thorough review of taxes and fees from utilities, cable, food and beverage, sales, telecom and hotels/motels. As a contingent based service there are no up-front costs and little risk for municipalities. AGS maximizes millions of dollars of municipal revenues per year for its clients by restoring incorrectly paid, missed, or underpaid taxes.



### BMO Bank • [bmo.com](http://bmo.com)

Christopher Daly • [Christopher.Daly@bmo.com](mailto:Christopher.Daly@bmo.com) • 312-461-3023

BMO provides banking & financial solutions to government, education & non-for-profit organizations.



### BMS Direct • [bmsdirectinc.com](http://bmsdirectinc.com)

Greg Allen • [greg.allen@bmsdirectinc.com](mailto:greg.allen@bmsdirectinc.com) • 317-674-2223

In 1990, BMS expanded from direct mail to include statement and billing production, helping local governments meet the growing need for reliable transactional communications. Today, we produce more than 27 million mail pieces annually. Our growth is fueled by a relentless commitment to innovation, new technologies, and adding value to our client relationships. We don't just print and mail—we protect your message, enhance its impact, and ensure it reaches the right hands. That's our mission.



### Bernardi Securities • [bernardisecurities.com](http://bernardisecurities.com)

John Vezzetti • [jvezzetti@bernardisecurities.com](mailto:jvezzetti@bernardisecurities.com) • 815-587-8972

A leading municipal bond boutique, Bernardi Securities, Inc. specializes in active municipal bond portfolio management and innovative public finance services. Our mission has remained the same since our founding – specialize in the municipal bond market to deliver superior performance for clients.



# CONFERENCE SPONSORS

## Exhibitors

### DebtBook • [debtbook.com](http://debtbook.com)

Emma Thornton • [emma.thornton@debtbook.com](mailto:emma.thornton@debtbook.com) • 610-223-1840

DebtBook offers modern treasury and accounting software designed to help state and local government, higher education, and others break through operational barriers to unlock strategic insights. Our Debt and Cash Management solutions improve financial outcomes by automating operational work and allowing teams to more easily analyze their data and extract valuable insights. Lease and Subscription Management solutions give accounting teams relief by automating GASB 87 and 96 compliance workflows.



### IIMC • [iimc.com](http://iimc.com)

Chris Salby • [chriss@iimc.com](mailto:chriss@iimc.com) • 909-944-4162

The International Institute of Municipal Clerks (IIMC) is a professional nonprofit organization founded in 1947, dedicated to enhancing the professionalism of municipal clerks worldwide. With over 15,000 members across various municipalities, IIMC offers extensive educational programs, certifications, and networking opportunities to support the development of municipal clerks. The organization is affiliated with 49 U.S. and nine Canadian associations, fostering a global network of municipal professionals.



### Old National Bank • [oldnational.com](http://oldnational.com)

Nadine Johnson • [nadine.johnson@oldnational.com](mailto:nadine.johnson@oldnational.com) • 224-570-6804

Old National understands that the needs of governments and municipalities are different than those of small businesses and corporate clients. That's why we have dedicated experts who can customize solutions for you. As active members of numerous industry associations, we believe in the mission of public service. We live and work in your community and are committed to developing meaningful relationships with the individuals and organizations that make our communities stronger, safer, and more beautiful.



### Point & Pay • [pointandpay.com](http://pointandpay.com)

Darrin Russell • [drussell@pointandpay.com](mailto:drussell@pointandpay.com) • 863-409-1977

Point & Pay designs, builds and integrates specialized payments solutions for utilities, courts and other government agencies. Products Include: Web Payment Portals, Mobile Payments, In Person Payments, IVR/Phone Payments, Paperless Billing, and Recurring Payments. Please stop by our booth to learn more or visit us at [www.pointandpay.com](http://www.pointandpay.com).



### PFM Asset Management • [pfmam.com](http://pfmam.com)

Michelle Binns • [binns@pfmam.com](mailto:binns@pfmam.com) • 872-240-6962

PFM Asset Management, a division of U.S. Bancorp Asset Management, Inc., serves public sector institutions looking for tailored, flexible investment advice. Our focus is providing investment-grade fixed income and multi-asset class solutions available in a variety of implementation options. We look forward to learning more about your organization and how we can serve you.



### US Bank • [usbank.com](http://usbank.com)

Nicholas Klatt • [nicholas.klatt@usbank.com](mailto:nicholas.klatt@usbank.com) • 651-466-8601

U.S. Bank provides comprehensive financial services tailored to the needs of the public sector. With our diversified product platform, we are committed to delivering innovative and reliable solutions to help our clients achieve their goals. We offer financial expertise in the areas of banking services, treasury management, trust & custody, investments, lending options, electronic payments, and are the issuing bank for the CAL Card program. Visit the U.S. Bank team to learn more about our services.





# CONFERENCE SPONSORS

## Supporters

### Cantella Capital Group

[cantella.com](http://cantella.com) • Jay Lanstein

[jlanstein@cantella.com](mailto:jlanstein@cantella.com) • 617-224-1426

Cantella Capital Group provides investment services to municipalities, including portfolio design, investment selection, and cash flow optimization. We tailor our offerings to meet each Treasurer's unique needs and preferences. Our small size allows us to deliver personalized service without sacrificing direct access to fixed income markets.

### Clock Tower Community Bank

[hometownbanks.com](http://hometownbanks.com) • Nick Oehmke

[nick.oehmke@mortonbank.com](mailto:nick.oehmke@mortonbank.com) • 217-726-0602

Clock Tower Community Bank is a division of Morton Community Bank. Morton Community Bank was organized in 1960, has 53 locations in 38 communities in Central and Northwest Illinois, with 600 employees and \$5.6 billion in assets.

### Flagstar Bank

[flagstar.com](http://flagstar.com) • Yvonne Jordan

[yvonne.jordan@flagstar.com](mailto:yvonne.jordan@flagstar.com) • 248-931-1112

Flagstar Bank's government banking team recognizes the unique financial requirements of the public sector. We partner with our clients to create solutions to meet their needs. Our team delivers expert advice and financial services to hundreds of public sector clients including municipalities, school districts, higher education, State and local authorities, and more. We offer a wide array of accounts and products to help public sector entities maximize efficiency, reduce costs, and manage cash flow.

### Piper Sandler

[pipersandler.com](http://pipersandler.com) • Victor E. Ume-Ukeje

[victor.ume-ukeje@psc.com](mailto:victor.ume-ukeje@psc.com) • 650-608-0581

Every government has important needs: from new buildings to water projects, street improvements and more, these needs come with complex financing structures and lengthy bond processes. Our local government finance professionals have the resources and experience to help you serve your community with improvement projects.

## Sunday Welcome Reception Sponsors

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

Illinois Municipal Treasurers Association

Indiana League of Municipal Clerks and Treasurers

Michigan Municipal Treasurers Association

Ohio Association of Public Treasurers

Oklahoma Municipal Clerks, Treasurers, and Finance Officials Association

Utah Association of Public Treasurers

Wyoming Association of Municipal Clerks & Treasurers





## Leveraging a 115 Trust: Attracting and Retraining Talent while Funding Tax-Free Retirement Healthcare

To learn more join us at the APT US&C Conference  
Tuesday, July 22 from 10:45 am - 11:45 am.

☎ +1 (773) 427-2060    🌐 [www.nppfabenefits.org](http://www.nppfabenefits.org)    ✉ [joelb@nppfabenefits.org](mailto:joelb@nppfabenefits.org)

**NPPFA**  **BENEFITS**  
*National Public Pension Fund Association*

### Sunday Welcome Reception

Join us in the Resort's Tin Cup restaurant and patio to meet up with your fellow conference attendees before sessions begin on Monday. A "Taste of Chicago" will be served, including Chicago-style pizza, mini Chicago dogs, ballpark popcorn, Italian beef sandwiches and giardiniera, Chicago-style potato chips, pasta salad, fruit, Eli's cheesecakes and assorted beverages.

**Sunday afternoon from 4:00 - 7:00 pm**

## Visit The Exhibit Hall

Meet new vendors that could help you with your job and make life easier! The 2025 Exhibit Hall is open from 8-5:30 on Monday and 8-1 on Tuesday. The Exhibit Hall is in the ballrooms on either side of the main sessions and will have refreshments during breaks for your convenience.

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

# Wave goodbye to fragmented systems



**Less  
paperwork**



**Faster  
collections**



**Happier  
residents**

**Visit our booth at APT US&C to learn more!**

**Paylt**<sup>TM</sup> 





# MORETON

## ASSET MANAGEMENT



Moreton Asset Management is a registered investment advisor (RIA) with the Securities and Exchange Commission (SEC)\*. Moreton Asset Management, LLC offers customized money market and fixed-income portfolio management for institutional clients. Expertise includes investment and risk management capabilities with exceptional client service, in-depth consultation and extensive interaction between clients and the investment team. Moreton specializes in portfolios that have significant regulatory needs. Clients include state and local governments, credit unions, community banks, and corporations.

[www.MoretonAdvisors.com](http://www.MoretonAdvisors.com) ▪ 801.869.4200 ▪ [jason@moretonadvisors.com](mailto:jason@moretonadvisors.com)

Investment products and services offered by or through Moreton Asset Management are not deposits or other obligations of, or guaranteed by Moreton Asset Management or any of its affiliates; nor federally insured by the FDIC, the Federal Reserve Board, or any other federal, state, or municipal governmental entity, and may be subject to investment risks, including the possible loss of principal.

Moreton Asset Management does not engage in the business of providing tax advice and its representatives do not practice before the Internal Revenue Service or any other taxing authority. Information in this email should not be considered to be tax advice, and is not intended to be such. Clients should consult their tax advisor regarding their own tax situation, including the tax effects of any investment recommendations of Moreton.

\*Registration with the SEC does not imply a certain level of skill or training

# CONFERENCE SCHEDULE

## Sunday, July 20

|                    |                                                             |                                       |
|--------------------|-------------------------------------------------------------|---------------------------------------|
| 10:00 am - 4:00 pm | Registration .....                                          | East Foyer                            |
| Noon - 4:00 pm     | Exhibitor Set-Up .....                                      | Ballrooms A-D, G-J                    |
| 3:00 pm - 4:00 pm  | Affiliate Presidents Meeting ( <i>by invitation</i> ) ..... | Cardinal Room                         |
| 4:00 pm - 7:00 pm  | <b>Welcome Reception</b> .....                              | Resort - Tin Cup Restaurant and Patio |

## Monday, July 21

|                     |                                                                                                 |                     |
|---------------------|-------------------------------------------------------------------------------------------------|---------------------|
| 7:30 am - 8:30 am   | Continental Breakfast .....                                                                     | Ballroom E/F        |
| 7:30 am - 8:30 am   | Registration .....                                                                              | Ballroom Foyer      |
| 8:00 am - 5:30 pm   | <b>Exhibit Hall Open</b> .....                                                                  | Ballrooms A-D, G-J  |
| 8:30 am - 9:00 am   | <b>Presentation of Colors &amp; Opening Remarks</b> .....                                       | Ballroom E/F        |
| 9:00 am - 10:30 am  | <b>Opening Keynote Address: Game Changing Conversation Strategies</b> ...<br><i>Jen Mueller</i> | Ballroom E/F        |
| 10:30 am - 10:45 am | Break                                                                                           |                     |
| 10:45 am - 11:45 am | <b>Economic Update</b> .....                                                                    | Ballroom E/F        |
|                     | <i>Frank Valle &amp; Erin Sloan, Illinois State Treasury Department</i>                         |                     |
| 11:45 am - 12:45 pm | Lunch .....                                                                                     | Marquis             |
| 12:15 pm - 12:45 pm | IMTA Annual Meeting - IMTA Members to Attend .....                                              | Ballroom E/F        |
| 12:45 pm - 1:45 pm  | <b>Concurrent Sessions</b>                                                                      |                     |
|                     | <b>Contactless Payments</b> .....                                                               | Ballroom E/F        |
|                     | <i>John Globensky, City of Grand Rapids for Paylt</i>                                           |                     |
|                     | <b>Investment Policy Analysis – Sounds Exciting!</b> .....                                      | DuPage Amphitheater |
|                     | <i>Greg Prost, Robinson Capital</i>                                                             |                     |
| 1:45 pm - 2:00 pm   | Break                                                                                           |                     |
| 2:00 pm - 3:00 pm   | <b>Concurrent Sessions</b>                                                                      |                     |
|                     | <b>Next Level Fraud Prevention: Strategies for Today's Threat Landscape</b> ..                  | Ballroom E/F        |
|                     | <i>Sierre Lindgren, Corpay</i>                                                                  |                     |
|                     | <b>Legislative Update (Illinois)</b> .....                                                      | DuPage Amphitheater |
|                     | <i>Brad Cole, IML</i>                                                                           |                     |
| 3:00 pm - 3:30 pm   | Break                                                                                           |                     |
| 3:30 pm - 4:30 pm   | <b>Concurrent Sessions</b>                                                                      |                     |
|                     | <b>Look Over the Hedge: Investigate Practices &amp; Investment Pools</b> .....                  | Ballroom E/F        |
|                     | <i>Jason Williams, Moreton Advisors</i>                                                         |                     |
|                     | <b>Insights from the Field: Uncovering Trends in Fraud Schemes</b> ..                           | DuPage Amphitheater |
|                     | <i>Brian Mivelli, WinTrust Financial</i>                                                        |                     |
| 4:30 pm - 5:30 pm   | <b>Exhibitor &amp; Sponsor Reception</b> .....                                                  | Ballrooms A-D, G-J  |
|                     | Evening On Your Own to Experience Chicago                                                       |                     |

## Hints for Navigating the Conference

- Exit the main session ballroom to the right for the stairway that leads down to the Marquis room for lunch.
- Exit the main ballroom to the left for the stairway that leads down to the DuPage Amphitheater for breakout sessions.
- Follow signs to use the elevators.
- Shuttles will run continuously between the resort's main entrance and the Morton Arboretum from 5:30 pm until 9:30 pm on Tuesday for transportation to and from the Awards Banquet.

# CONFERENCE SCHEDULE

## Tuesday, July 22

|                     |                                                                                                                                                                    |                     |
|---------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|
| 8:00 am - 1:00 pm   | Exhibit Hall Open . . . . .                                                                                                                                        | Ballrooms A-D, G-J  |
| 8:00 am - 9:00 am   | Continental Breakfast . . . . .                                                                                                                                    | Ballroom E/F        |
| 9:00 am - 10:30 am  | <b>Laughter Is Medicine</b> . . . . .<br><i>Danny Adams</i>                                                                                                        | Ballroom E/F        |
| 10:30 am - 10:45 am | Break                                                                                                                                                              |                     |
| 10:45 am - 11:45 am | <b>Concurrent Sessions</b>                                                                                                                                         |                     |
|                     | <b>Safeguarding Public Funds</b> . . . . .<br><i>Steve Adams, Sara Schnoor, Kristen Angel, PTMA</i>                                                                | Ballroom E/F        |
|                     | <b>Leveraging a 115 Trust: Funding Tax-Free Retiree Healthcare</b> . . . . .<br><i>Joel Babbitt, NPPFA</i>                                                         | DuPage Amphitheater |
| 11:45 am - 1:00 pm  | Lunch . . . . .                                                                                                                                                    | Marquis             |
| 12:30 pm - 1:00 pm  | APT US&C Annual Meeting - APT US&C Members to Attend . . . . .                                                                                                     | Ballroom E/F        |
| 1:00 pm - 2:00 pm   | <b>Resilience by Design: Public Funds Portfolio Strategies</b> . . . . .<br><i>Sofia Anastopoulos, IMET; Jason Click &amp; Jason Headings, Meeder Public Funds</i> | Ballroom E/F        |
| 1:00 pm - 5:00 pm   | Exhibitor Breakdown . . . . .                                                                                                                                      | Ballrooms A-D, G-J  |
| 2:00 pm - 2:15 pm   | Break                                                                                                                                                              |                     |
| 2:15 pm - 3:15 pm   | <b>Concurrent Sessions</b>                                                                                                                                         |                     |
|                     | <b>From Hype to Help: Practical AI Applications</b> . . . . .<br><i>Joe Ross, BS&amp;A Software</i>                                                                | Ballroom E/F        |
|                     | <b>An In-Depth Look at OPEB</b> . . . . .<br><i>Brian Whitworth, Hilltop Securities</i>                                                                            | DuPage Amphitheater |
| 3:15 pm - 3:30 pm   | Break                                                                                                                                                              |                     |
| 3:30 pm - 4:30 pm   | <b>Courageous Leadership: Living a Life of Influence</b> . . . . .<br><i>Dan Meers</i>                                                                             | Ballroom E/F        |
| 4:30 pm             | Silent Auction Winner Announcements                                                                                                                                |                     |
| 6:00 pm - 6:30 pm   | <b>Cocktail Reception</b> . . . . .                                                                                                                                | Morton Arboretum    |
| 6:30 pm - 9:00 pm   | <b>Awards Banquet &amp; Installation of Officers</b> . . . . .                                                                                                     | Morton Arboretum    |

## Wednesday, July 23

|                     |                                                                                                                         |              |
|---------------------|-------------------------------------------------------------------------------------------------------------------------|--------------|
| 8:00 am - 9:00 am   | Continental Breakfast . . . . .                                                                                         | Ballroom E/F |
| 9:00 am - 10:15 am  | <b>Retention, Succession, and Planning</b> . . . . .<br><i>Jill O'Brien, Laner Muchin</i>                               | Ballroom E/F |
| 10:15 am - 10:30 am | Break                                                                                                                   |              |
| 10:30 am - 11:45 am | <b>Disaster Preparedness: Business Continuity in a Crisis</b> . . . . .<br><i>Ghida Neukrich, City of Highland Park</i> | Ballroom E/F |
| 11:45 am - Noon     | <b>Closing Comments</b> . . . . .                                                                                       | Ballroom E/F |
| 1:00 pm - 6:00 pm   | <b>Post-Conference Training: Advanced CPFIM</b> . . . . .<br><i>Greg Prost, Robinson Capital Management, LLC</i>        | Ballroom E/F |

## Annual Membership Meetings - Electing New Boards

- All IMTA members need to attend the annual meeting at 12:15 on Monday.
  - All APT US&C members need to attend the annual meeting at 12:30 on Tuesday.
- \*\*\*Bring your lunch to the ballroom to participate in the membership meetings and ensure a quorum.\*\*\*

All educational sessions and the Exhibit Hall are at the Hilton Resort. Times are in the Central Time Zone.  
General and concurrent sessions in the Ballroom E/F will be livestreamed to virtual attendees. Schedule subject to change.



# CONFERENCE PROGRAMMING



**Monday, 9:00 am - 10:30 am • Ballroom EF**

**Opening Keynote Address: Game Changing Conversation Strategies**  
*Jen Mueller*

Straight from the sidelines, veteran sports broadcaster Jen Mueller shares broadcast secrets and stories from the locker room that demonstrate less is more when it comes to effective communication. She'll provide conversation strategies that help you create buy-in, land your message, set up productive conversations and communicate effectively.



**Monday, 10:45 am - 11:45 am • Ballroom EF**

**Economic Update**

*Frank Valle, Associate Director of Fixed Income, Marquette Associates*

*Erin Slone, Deputy Director of Illinois Funds for Outreach Office of the Illinois State Treasurer*

Navigate today's complex economic landscape with insights from experts at Marquette Associates, investment consultant to the Illinois State Treasurer's Office. We'll examine the implications of current economic volatility, evolving trade policies and tariffs, geopolitical conflicts, and employment trends on municipal investment portfolios. This session will cut through market noise to provide clear analysis of how these macroeconomic forces directly impact local government treasury operations and investment strategies.



Attendees will also discover comprehensive treasury management tools and investment solutions offered by the Illinois State Treasurer's Office, designed specifically to help municipalities safeguard and optimize their financial resources during uncertain times.

## 2024-25 Annual Report

**Get Your Copy at Tuesday's  
Annual Membership Meeting and Stay Up-to-Date  
With APT US&C Accomplishments and Goals**

**Available In-Person or  
Online at [APTUSC.org](https://APTUSC.org)**



Working **together**  
to serve you **better.**



**CONTACT INFORMATION**

**855.226.7337**

**IllinoisPay.com**



**CONTACT INFORMATION**

**800.947.8479**

**IllinoisFunds.com**



# CONFERENCE PROGRAMMING



**Monday, 12:45 pm - 1:45 pm • Concurrent Session (1 of 2) • Ballroom EF**

## **Contactless Payments**

*John M. Globensky, Treasurer, City of Grand Rapids, Michigan*

City Treasurer, John Globensky, will share how Grand Rapids modernized resident services, making it easier to pay for things like taxes, water, and parking. He'll offer practical insights on what worked, what didn't, and how the city grew collections by 398% by implementing transformational changes.



**Monday, 12:45 pm - 1:45 pm • Concurrent Session (2 of 2) • DuPage Amphitheater**

## **Investment Policy Analysis – Sounds Exciting!**

*Greg Prost, Robinson Capital*

A well-crafted investment policy may not grab headlines, but it's the backbone of responsible public fund investment management. While each state has its own rules, strong policies share common traits. In this session, we'll explore why every government entity should implement, maintain, and follow a clear investment policy, and how the best ones strike a balance between flexibility and control. We'll also walk through what it takes to achieve APT certification and why that recognition matters.



**Monday, 2:00 pm - 3:00 pm • Concurrent Session (1 of 2) • Ballroom EF**

## **Next-Level Fraud Prevention: Strategies for Today's Threat Landscape**

*Sierré Lindgren, Corpay*

The average cost of a successful Business Email Compromise (BEC) attack is more than \$125,000! In an era where cybercriminals lurk around every digital corner, protecting your business from payments fraud is paramount. This insightful presentation will expose the intricate web of deception used by fraudsters, including the menacing threats of BEC and Vendor Impersonation. Gain invaluable insights into the tactics employed by cybercriminals and discover battle-tested strategies to fortify your defenses. Are you truly prepared to thwart the insidious schemes that could compromise your organization? Challenge your assumptions, strengthen your security posture, and emerge empowered to defend your business against the shadows of cybercrime.



**Monday, 2:00 pm - 3:00 pm • Concurrent Session (2 of 2) • DuPage Amphitheater**

## **Legislative Update**

*Brad Cole, Illinois Municipal League*

Hear about the most recent updates to relevant State Laws affecting municipalities in Illinois.





## Public funds, meet private-sector precision.

- Full-service AP automation
- One platform for all payments
- Simple, paperless workflows
- Proven fraud mitigation

**Built for government.**  
**Trusted nationwide.**



**It pays to Corpay.**  
[www.corpay.com](http://www.corpay.com)



## UPCOMING APT US&C ANNUAL CONFERENCES



**MICHIGAN - 2026**



**OKLAHOMA - 2027**



**OHIO - 2028**

If you'd like to experience an APT US&C annual conference in your state, please contact us to discover how we can collaborate in 2029 or 2030.

# CONFERENCE PROGRAMMING



**Monday, 3:30 pm - 4:30 pm • Concurrent Session (1 of 2) • Ballroom EF**

**Take a Look Over the Hedge: Investigate Practices and Investment Pools from Various States and Local Governments Across the Country**

*Jason Williams, Moreton Advisors*

Broaden your knowledge of investment practices, allocations, and local pool options across the country. You invest public funds on behalf of your municipality in your state 'USA', satisfy your curiosity of how a sampling of other states and local governments invest in states that are not your own. How does your state pool compare to other state pools? What kind of investment allocations do other counties or cities employ that are not in your state? Take a look 'Over the Hedge' outside of your state for a broader view of local government investment allocations, local government pool comparisons, and peer review of how cities and counties invest across the country.



**Monday, 3:30 pm - 4:30 pm • Concurrent Session (2 of 2) • DuPage Amphitheater**

**Insights from the Field: Uncovering Trends in Fraud Schemes & Investigations**

*Brian Mivelli CAMS, CFS, Sr. Fraud Investigations Manager*

It's not a matter of "if" but "when" you or your organization will be affected by fraud. This informative discussion will explore a municipal fraud case study and the latest fraud threats and tactics; efforts to combat fraud; and how financial crimes are investigated. Learning objectives include identify the current financial fraud landscape including the latest schemes and risks; understand how you can protect yourself and your organization; understand how financial institutions combat and investigate financial crimes.



**Tuesday, 9:00 am - 10:30 am • Ballroom EF**

**Laughter is Medicine**

*Featured Speaker Danny Adams*

"Laughter is Medicine" presentation will leave you filled with laughter! This interactive session highlights the transformative power of laughter, emphasizing how it boosts productivity, relieves stress, and enhances mental and physical well-being. We all tend to carry stress in our jobs and personal lives, and it's good to be reminded to take a break and have a good laugh!

## What's Going On With All Those Baskets?

Don't miss your opportunity to go home with a basket full of choice items curated for you by other APT US&C members. The Illinois team has worked hard to make these offerings available - just put a bid in on the silent auction sheet for your favorite basket - winners will be announced on Tuesday afternoon so you can claim your prize. All proceeds support the Illinois Municipal Treasurers Association (IMTA) Scholarship Fund. Thank you for your support!





# WE TAKE A **DIFFERENT** APPROACH TO MAKING A **DIFFERENCE.**

WE ARE HONORED TO PARTNER WITH THE  
**ASSOCIATION OF PUBLIC TREASURERS  
OF THE UNITED STATES AND CANADA**  
AND THEIR EFFORTS TO MAKE A LASTING  
IMPACT IN OUR COMMUNITY.

DIFFERENT APPROACH, BETTER RESULTS®

**WINTRUST**  
GOVERNMENT FUNDS

[wintrust.com](http://wintrust.com)

Banking products provided by Wintrust Financial Corp. banks.





# CONFERENCE PROGRAMMING



## **Tuesday, 10:45 am - 11:45 am** **Concurrent Session (1 of 2) • Ballroom EF**

### **Safeguarding Public Funds: An Introduction into Municipal Investment Management**

*Steve Adams, PTMA*

*Sara Schnoor, Vice President, Investment  
Services, PTMA*

*Kristen Angel, Senior Director and Team  
Lead of Investment Services, PTMA*

This session will provide a detailed review and classify authorized investment vehicles (e.g., U.S. Treasuries, municipal bonds, certificates of deposit) understanding the characteristics, risks, and returns of each type. It will also help attendees understand the importance of capital preservation and risk management. Attendees will gain a deeper understanding of the who, what, where, when, why and how of investing for municipal entities.



## **Tuesday, 10:45 am - 11:45 am • Concurrent Session (2 of 2) • DuPage Amphitheater**

### **Leveraging a 115 Trust: Attracting and Retraining Talent while Funding Tax-Free Retiree Healthcare**

*Joel J. Babbitt, NPPFA Benefits Group*

Attendees will hear in-depth details on how the 115 Trust is a unique solution that aligns benefits and compensation for municipal employees and can be used to pay for retirement healthcare expenses including insurance premiums.



## **Tuesday, 1:00 pm - 2:00 pm** **Ballroom EF**

### **Resilience by Design: Public Funds Portfolio Strategies for Every Market Cycle**

*Sofia Anastopoulos, Executive Director and  
Chief Investment Officer, IMET*

*Jason Click, President, Meeder Public Funds*

*Jason Headings, Senior Vice President,  
Meeder Public Funds*

This session provides a comprehensive roadmap for public fund managers to build portfolios that are not only compliant and secure but also agile enough to perform through economic highs and lows. We'll explore how to integrate detailed cash flow forecasting into your investment process to enhance liquidity management and reduce reinvestment risk. We'll also cover strategic asset allocation and portfolio construction techniques tailored to public sector objectives to ensure your portfolio is built to endure and adapt across all market environments.



**PTMA**  
FINANCIAL SOLUTIONS

[WWW.PTMA.COM](http://WWW.PTMA.COM)

# Helping Communities Thrive.

**WE DESIGN AND DELIVER FINANCIAL SOLUTIONS THAT HELP COMMUNITIES ACROSS THE COUNTRY MANAGE THEIR MONEY MORE EFFECTIVELY.**

CUSTOMIZED INVESTMENT SOLUTIONS

INVESTMENT ADVISORY SOLUTIONS

BOND PROCEEDS MANAGEMENT

CASHFLOW ANALYSIS

PUBLIC FINANCE

LOCAL GOVERNMENT INVESTMENT POOLS



**Stephen Adams**

[stephen.adams@ptma.com](mailto:stephen.adams@ptma.com)  
(618) 604-7677



**Jeff Anderson**

[jeff.anderson@ptma.com](mailto:jeff.anderson@ptma.com)  
(517) 719-4503



**Kristin Angel**

[kristin.angel@ptma.com](mailto:kristin.angel@ptma.com)  
(517) 861-6515



**Adam McCauley**

[adam.mccauley@ptma.com](mailto:adam.mccauley@ptma.com)  
(513) 633-1400



**Sara Schnoor**

[sara.schnoor@ptma.com](mailto:sara.schnoor@ptma.com)  
(414) 436-1979

For important disclosure information,  
visit [www.ptma.com/disclosures](http://www.ptma.com/disclosures).



## Get Connected & Access Conference Materials!

Presentations • Attendance Roster • Schedule • Speaker Biographies  
Annual Meeting Packet • 2025-26 Board of Director Election Slate

**Download the Conference App**

Scan QR code or visit [APTUSC.org/25cm](http://APTUSC.org/25cm) for more info



# CONFERENCE PROGRAMMING



**Tuesday, 2:15 pm - 3:15 pm • Concurrent Session (1 of 2) • Ballroom EF**

**From Hype to Help: Practical AI Applications for Local Government Operations**

*Joe Ross, BS&A Software*

This session demystifies artificial intelligence by focusing on practical, real-world applications that local governments can implement today. Aimed at finance and operations leaders, it highlights ways AI is already being used to drive efficiency, reduce manual workload, and improve public service. Without requiring technical expertise, the session guides attendees through use cases, implementation strategies, ethical considerations, and how to build a successful AI pilot program tailored to municipal operations.



**Tuesday, 2:15 pm - 3:15 pm • Concurrent Session (2 of 2) • DuPage Amphitheater**

**OPEB and OPEB Funding: Huge Variation Across the US**

*Brian Whitworth, Hilltop Securities*

What are some of the typical differences in OPEB from state to state? What are common differences between Pensions and OPEB, and how might that affect prefunding? Why are many OPEB plans pay as you go and many others overfunded? What are some potential hazards and suggestions regarding prefunding? How are OPEB data and cybersecurity risks often different from Pension or General Fund moneys?



**Tuesday, 3:30 pm - 4:30 pm • Ballroom EF**

**Courageous Leadership: Living of Life of Influence**

*Featured Speaker Dan Meers*

On November 23, 2013, Dan Meers came within inches of losing his life while practicing a bungee jump and zip line stunt at Arrowhead Stadium... home of the Kansas City Chiefs. What Dan anticipated being the thrill of a lifetime ended up being the spill of a lifetime. The stunt went terribly wrong and Dan plummeted 75 feet before crashing into the stadium seats. Miraculously Dan survived. He spent 9 days in the hospital and got some really big scars. Dan smiles when he says, "Scars are just tattoos that come with a cool story." During this powerful presentation Dan shares his incredible story and the important lessons that he learned during his long road to recovery about leadership and about life.

## 2025 CONFERENCE PLANNING COMMITTEE

***Congratulations to this fantastic group from around the country for an incredible job in planning and implementing this year's Annual Conference.***

*Erin Crawford, Oklahoma - Committee Chair  
Becky Kijak, Illinois - Committee Co-Chair*



# TRUSTED ADVICE TAILORED SOLUTIONS



Since 1946, HilltopSecurities has been a trusted advisor for public entities and institutional investors. As a leader in municipal investment banking—and fully integrated financial solutions—we have the scale and strength to help you advance the community you serve. Contact us to explore how our resources and experience can work for you.

717 N. Harwood Street  
Dallas, TX 75201  
[muniservices@hilltopsecurities.com](mailto:muniservices@hilltopsecurities.com)

**800.839.7827**



**HilltopSecurities.com**



© 2025 Hilltop Securities Inc. | All rights reserved. | MEMBER: NYSE/FINRA/SIPC | HTS1644734357

*Thank  
You!*

Matt Anastasia, Illinois  
Susan Balls, Utah  
Vickie Barger, Ohio  
Karen Coffman, Michigan  
Colleen Feger, Illinois  
Heather Gale, Utah

Lindsey Grigg-Moak, Oklahoma  
Jill Hunt, Utah  
Dawn Keiser, Michigan  
Vicki Kitchen, Indiana  
Clint Lichtenwalter, Illinois  
Carrie Mugford, Indiana

Penny Robbins, Wyoming  
Julie Silbernagel, Wyoming  
Jennifer Sweat, Utah  
Melinda Weaver, Michigan  
Tricia Wiggle-Bazzy, Michigan

# CONFERENCE PROGRAMMING



## **Wednesday, 9:00 am - 10:15 am • Ballroom EF**

### **Retention, Succession, and Planning**

*Jill O'Brien, Laner Muchin*

Retention, recruitment, and succession planning are critical to maintaining a strong and effective municipal government workforce. In this session, you will learn about the importance of fostering a positive work environment, offering competitive benefits, and investing in professional development to attract top talent, retain experienced staff, and ensure continuity through thoughtful succession strategies.



## **Wednesday, 10:30 am - 11:45 am • Ballroom EF**

### **Disaster Preparedness: Business Continuity in a Crisis**

*Ghida Neukrich, City of Highland Park*

City Manager Ghida Neukrich will present an overview of Highland Park's emergency response following a mass shooting at their Independence Day parade in 2022, plus the City's on-going resiliency efforts to serve the community.



## **Wednesday, 1:00 pm - 6:00 pm • Ballroom EF**

### **ACPFIM - Advanced Certified Public Funds Investment Manager Training**

*Greg Prost, CIO, Robinson Capital Management*

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. The ACPFIM training provides the confidence and knowledge to manage your investments more efficiently and effectively. *This program requires a written exam and is only open to CPFIM graduates.*

## **APT US&C 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 [APTUSC.org](http://APTUSC.org) for more information.



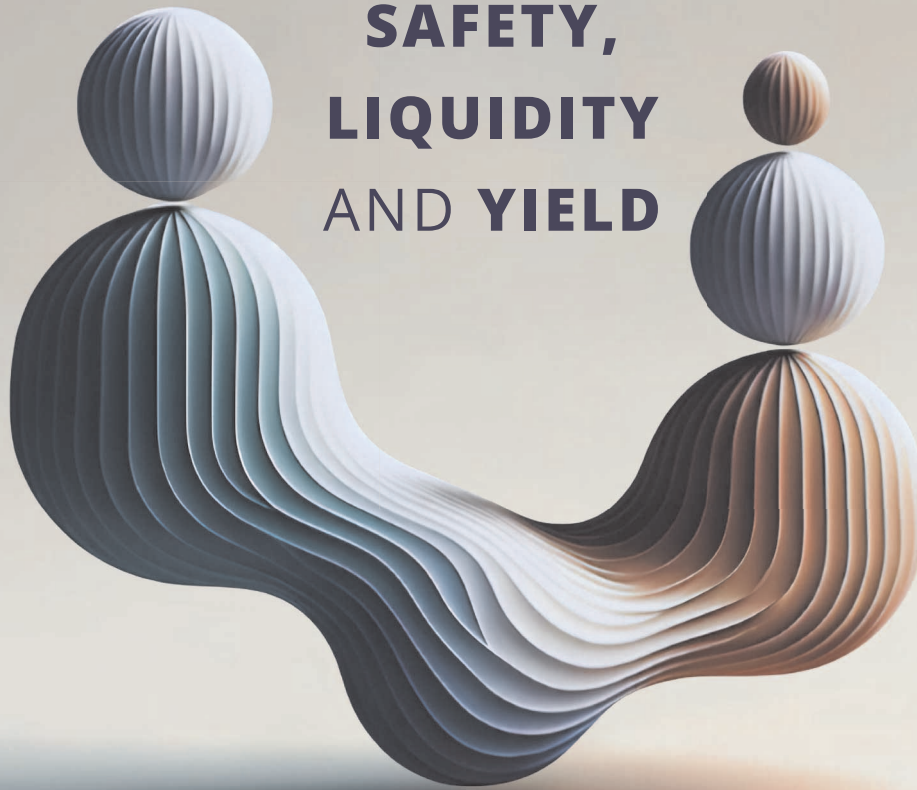


ILLINOIS  
MUNICIPAL  
TREASURERS  
ASSOCIATION



*Thank you to our host  
affiliate for their  
leadership, hospitality,  
and dedication to  
providing an amazing  
conference!*

BALANCING  
**SAFETY,**  
**LIQUIDITY**  
AND **YIELD**



**ROBINSON**  
CAPITAL

**Greg Prost**  
**Chief Investment Officer**  
313.821.7705  
[gprost@robinsonfunds.com](mailto:gprost@robinsonfunds.com)

**John Strainer**  
**Portfolio Manager**  
313.821.7004  
[jstrainer@robinsonfunds.com](mailto:jstrainer@robinsonfunds.com)





bsasoftware.com   
855-272-7638   
inquiry@bsasoftware.com 

# Cloud-based ERP Software That **Empowers Local Governments** and Their Communities to Thrive.

**2,300+**

Local Governments  
Served

**100%**

Focused on Local  
Government ERP Solutions

**99%**

of BS&A Customers *Stay*  
BS&A Customers

Financial Management

Payments

Assessing & Property Tax

Utilities Management

Human Resources Management

Community Development

Online Services



# SPECIAL EVENTS & NETWORKING OPPORTUNITIES

## Sunday Reception

Meet your fellow conference attendees at the official kick-off event of the conference. Meet at the on-site Tin Cup restaurant and patio between 4:00 and 7:00 pm to experience a “Taste of Chicago” and great company. We’ll see you there!

## Monday Exhibitor Reception

Exchange ideas and learn new solutions with your fellow conference attendees and exhibitors! The one-hour reception immediately following the final session on Monday afternoon will be in the exhibit halls on either side of the main ballroom. Snack on mini-desserts and an assortment of beverages while you browse the exhibits and converse with vendors and other attendees. Event will conclude at 5:30 to give you plenty of time to experience the local attractions.

## Tuesday Awards Banquet

The awards banquet will start with a cocktail reception at 6:00 followed by a delightful dinner, award presentations, and board installations for both APT US&C and IMTA. Meet at the resort main entrance for transportation to the lovely Morton Arboretum - buses will run from 5:30 to 9:30 pm.

## Visit Chicago

No matter what you’re interested in, Chicago has endless choices! Regardless of whether your interests include museums, sports, music, architecture, attractions, parks, the waterfront, performing arts, shopping, or the colorful history of the city, you’re sure to find activities that will amaze you. Visit [choosechicago.com](http://choosechicago.com) to find options for your trip into the city.

## Experience DuPage County/the Village of Oak Brook

There are an incredible number of entertainment and restaurant options within just a few miles of the Oak Brook Resort. If you’re not sure where to start, here’s a few options:

- RH Rooftop Restaurant: a gorgeous skylit garden escape with fountains, heritage olive trees and sparkling chandeliers. On the third floor of the Restoration Hardware gallery.
- Pinstripes: delicious made-from-scratch Italian-American food paired with fun-filled full-service bowling and bocce areas.
- Puttshack: the next generation indoor putt-putt golf automatically tracks every shot so you can focus on the fun. Features a next level menu with crave-worthy bites and shareables.
- Wondervers: amazing interactive attractions from a variety of movies with multiple themed bars and full restaurant.





# 2026 APT US&C ANNUAL CONFERENCE

## Save The Date



2026 APT US&C ANNUAL CONFERENCE • IN PARTNERSHIP WITH MMTA  
AUGUST 16-19, 2026 • AMWAY GRAND PLAZA HOTEL • GRAND RAPIDS • MICHIGAN • [APTUSC.ORG](http://APTUSC.ORG)