



Association of Public Treasurers  
of the United States and Canada

**CPFIM/ACPFIM Recertification Points Chart**

<b>Experience Points</b> <i>All points must be earned since last certification</i>	<b>Points</b>	<b>Maximum Allowed</b>
Work at a municipal government entity or a special district or retirement system (as defined by APT US&C membership) with direct responsibility of the oversight and/or management of investments of public funds.	2 per year	10
Work at a business/corporation that supports the oversight and/or management of investments of public funds for municipalities.	2 per year	10
Serve as a member of an Investment Committee or Board Member offering guidance and/or oversight of investments of public funds.	1 per year	5
Earn/maintain a recognized national professional achievement certification program related to treasury management (e.g., Certified Treasury Professional - CTP, Certified Government Financial Manager - CGFM, Certified Public Finance Officer - CPFO, Certified Management Accountant - CMA).	2 points for each certification earned; 1 point for each certification maintained	15
Earn the APT US&C Advanced Certified Public Funds Investment Manager certification	N/A	15

<b>Education Points</b> <i>All points must be earned since last certification</i>	<b>Points</b>	<b>Maximum Allowed</b>
Masters or Doctoral degree.	N/A	30
Bachelor degree in public administration, accounting, finance or related field.	N/A	20
Associate degree in public administration, accounting, finance, or related field.	N/A	10
Attend an APT US&C CPFIM Recertification class.	N/A	10
Attend investment training classes offered by APT US&C or a State/Province Affiliate Association of APT US&C.	1 point for every 1 hour of instruction	25
Attend investment training classes offered by non-APT US&C state or province Associations.	1 point for every 2 hours of instruction	25
Achieve APT US&C Certification of your Investment Policy	N/A	10
Retake the CPFIM or ACPFIM training program and pass the exam.	N/A	35

**CPFIM Recertification applicants must demonstrate a minimum of 35 total points between both experience and education categories.**