

Certified Public Funds Investment Manager Training

Tuesday, May 9, 2023

Exam on Wednesday May 10

St. George, Utah

What You'll Learn



The nationally recognized Certified Public Funds Investment Manager (CPFIM) certification program is designed to provide the confidence and knowledge to manage your investments better. The training covers the six modules listed below and requires a written test to demonstrate material retention and comprehension. Classroom time is about six hours. Graduates will receive a certificate upon completion and will be mailed a plaque recognizing their accomplishment.

Investment Instruments

Investment Options and Characteristics, Bond Lingo, and Your Investment Comfort Zone

Banks, Brokers, and Advisors

Where You Buy and Keep Investments, Due Diligence, Purchasing, Specific Investment Details

Governance & Your Investment Policy

The Investment Policy, Internal Controls, Developing Procedures

Safety, Liquidity, and Yield

Identifying and Mitigating Risks, Quantifying and Reporting Safety, Understanding Liquidity Needs, Yield Calculations

Cash Flow

Bank and Investment Accounts, Creating a Reserve Account, Determining How Much You Have to Invest, Cash Flow Forecasting

Your Strategy

Elements of a Good Strategy, Laddering, Barbell, Matching, Investment Choices

Location

This training will ONLY be offered in-person at the St. George City Hall in southern Utah. There is no virtual attendance option.

Time: 8:00 am - 3:00 pm MT. The required exam will be held the following day, Wednesday, May 10 from 8:00 - 9:30 am.

Cost: Fee for members of either UAPT and APT US&C is \$299; non-member fee is \$499.

Location: the class will be held at the St. George City Hall Board Room located at 175 East 200 North, St. George, Utah.

UAPT Annual Conference: this training is right before the UAPT Annual Conference at the Abbey Inn. Please note that registration fees are separate for the two events.

Instructor



Jason Williams has over 20 years of capital markets experience with trading, sales, and fixed income markets. As the President of Moreton Asset Management, he is responsible for portfolio management, operations oversight, sales, and client relations.

Prior to joining Moreton Asset Management where he has served as president for 11 years, Jason was a senior portfolio manager with Contango Capital Advisors Fixed-Income Team, portfolio manager at Zions Bank Liquid Asset Management, and a senior financial representative with Fidelity Investments.

Jason earned his B.A. in Political Science and Economics from Brigham Young University, and an MBA in finance from the University of New Hampshire. He resides in Farmington, Utah

Register at www.APTUSC.org