Advanced Certified Public Funds Investment Manager Training

Wednesday, January 18, 2023
In-Person & Online

What You'll Learn

The ACPFIM is designed to enhance your understanding and build on the foundation of the CPFIM class. 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 class includes a written test.

Graduates will receive a certificate upon completion and will be mailed a plaque recognizing their accomplishment. Having a current CPFIM is a prerequisite for this training.

Analysis
- *Quantifying Your Investment Policy Objective*
- *Understanding the Risks, Liquidity, and Yield*
- *Defining Risk in Your Investment Portfolio*
- *Liquidity Analysis*
- *Yield Analysis*

Investment Strategy
- *Understanding the Difference Between Policy and Strategy*
- *Common Strategies*
- *Developing and Implementing a Plan*
- *Dealing with Obstacles of Chance*
- *Investment Management Process*
- *Active and Passive Investment Strategies*
- *Interest Rate Forecasting and Bench Marking*

"Greg is the perfect instructor. Thank you for the opportunity to learn from him!"

Register at www.APTUSC.org

Attend In Person or Online

This training will be offered in-person and as a livestreamed event on Wednesday, January 18 from 1:00 - 6:00 pm ET.

Training cost is $299 for APT US&C members and $499 for non-members.

In-Person: the class will be held at the Hilton Garden Inn - Lansing West ballroom located at 633 N Canal Road in Lansing, Michigan.

Online attendees: you will receive a Zoom meeting link to attend the livestreamed session. Online attendees can interact via the chat or by unmuting yourself to ask a question. Start time is 1:00 pm Eastern (Noon Central, 11:00 am Mountain, 10:00 am Pacific).

Instructor

Greg Prost is a knowledgeable and entertaining speaker who presents to MMTA, MGFOA, MACT, and APT US&C. Since becoming APT US&C's CPFIM/ACPFIM instructor in 2018, Greg has received rave reviews. He 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 holds an MBA from Western Michigan University, as well as a BA in Economics from Kalamazoo College. Greg is a CFA Charterholder and member of the CFA Society of Detroit.