Certified Public Funds Investment Manager Training

TUESDAY, MARCH 19, 2024

Exam on Wednesday March 20

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

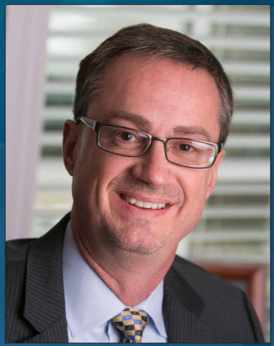
Online Training

The training is an interactive, livestreamed event where attendees can comment and ask questions directly or via the online chat. The training is on Tuesday, March 19 from 11:00 am - 6:00 pm ET and the required exam will be held the following day, Wednesday, March 20. Attendees may be assigned an exam time; the exam typically takes between one and two hours.

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

Please note your start time: 11:00 am Eastern/10:00 am Central/ 9:00 am Mountain/8:00 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.