

Manage Your Investments Better

Certified Public Funds Investment Manager Training

Tuesday, October 7, 2025 (11:00 am - 6:00 pm)

Exam on Wednesday, October 8



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 five 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.

Safety

Investment Instruments; Investment Options, Investing & Bond Basics, Bond Market Jargon, Fiduciary Responsibility and Safety First, Risk and Internal Controls, How to Buy Investments, Where You Keep Investments, and Due Diligence.

Investment Policy

Common Mistakes, Considerations and Categories, Scope, Objectives, Diversification, Accounting and Reporting Requirements, Performance Evaluation, Ethics, Policy Certification.

Liquidity

Managing and Forecasting Cash Flow, Cash Flow Analysis, Anticipating Change, Common Misperceptions.

Yield

Types of Yield, Factors Affecting Yield, Risk and Exposure, Duration, Price, Differences Between Yield and Return.

Your Strategy

Strategy Considerations, Asset Allocation, Laddering, Bullet, Barbell, Matching, the Yield Curve, Working with Brokers, Callable Bonds, Trading, and Decisions.

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, October 7 from 11:00 am to 6:00 pm ET and the required exam will be held the following day, Wednesday, October 8. 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, and 8:00 am Pacific.



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.

Greg 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.

Register at www.APTUSC.org