



ASSOCIATION OF PUBLIC TREASURERS OF THE UNITED STATES & CANADA

Certified Public Funds Investment Manager Training

Tuesday August 18

Test On Wednesday, August 19

**Sign Up Now
For This Live Webinar
Earn Your CPFIM**

Online Training via Zoom

Live Training • Ask Questions via Chat • See the Instructor & Presentation
A Written, Closed-Book, One Hour Test Is a Component of the CPFIM
You Will Receive Login Instructions After Registration

Enhance Your Knowledge • Broaden Your Network • Strengthen Your Career

**ONLINE
TRAINING**

Schedule

TUESDAY - 8/18

11:00 am - 6:00 pm EDT

*There will be a lunch break
and additional shorter breaks.

WEDNESDAY - 8/19

Each attendee will be
scheduled a test time for
Wednesday morning to
allow for one-on-one time
with the instructor to
review their test results.

Cost

APT US&C Members
\$299

Non-Members
\$499



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CPFIM Program Curriculum

The CPFIM program covers six modules and requires a written test to demonstrate material retention and comprehension. Classroom time is six hours. Graduates receive a plaque showing their accomplishment and are recognized during the APT US&C Annual Conference.

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

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.



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

"I learned a lot about responsibilities, investments, and how to watch market trends."

"I really learned a lot from this conference ... it was a great addition to my education."

~ 2019 Attendees ~