



Association of Public Treasurers of the United States and Canada

Certified Public Finance Administrator (ACPFA) Advanced Certification Information & Application

The Advanced CPFA rewards CPFA holders for a commitment to advanced educational topics offered by the APT US&C and its state and province associations.

The Advanced CPFA is designed to encourage and reward advanced education as well as participation in the APT US&C and its state and province associations to help strengthen our entire treasury community. Applicants must:

- Have a current CPFA at the time of application for the Advanced CPFA.
- Be an active APT US&C member.
- Demonstrate 15 experience points and 45 advanced education points.

The ACPFA accreditation expires after five years.

Each applicant for Advanced CPFA certification must meet the following eligibility standards:

1. In each year since last CPFA certification, must have been a duly elected or appointed treasurer, deputy or assistant treasurer, employee in/or dealing with the office of treasurer, or other principal officer in the public entity who is charged with the performance or supervision of one or more of the following responsibilities: investments, debt, or treasury activities.
2. Maintained continuous Active Membership (see APT US&C's Bylaws for definition):
 - a. For each of the years since their last CPFA certification; and
 - b. At the time of approval.
3. Believe in and practice APT US&C's Code of Ethics (as adopted).
4. Have a current CPFA certification. Successful completion of the Advanced CPFA will result in automatic renewal of the CPFA and the expiration date of the CPFA will be extended for five years from the date of approval.
5. Demonstrate a combined total of 60 experience and education points per the chart on the following page. 15 points must be earned in experience and 45 points in education.
6. Submit a non-refundable fee of two hundred dollars (\$200). The application fee will be waived for the second submission if the first attempt at certification is unsuccessful. The fee includes application processing and certification plaque.

The application deadline is June 1st and CPFA designations are formally announced at the APT US&C Annual Conference.

Note: a candidate whose application is not approved by the CPFA Certification Committee will be notified of the Committee's decision and the steps needed to receive the credential. Should the candidate disagree with the Committee's ruling and recommendation on how to earn the necessary points for certification, the candidate may appeal the Committee's decision. The appeal must be sent in writing to APT US&C's headquarters within thirty (30) days of notification of the Committee's decision. The Committee Chair, within thirty (30) days, shall reconsider the circumstances and reverse the decision or submit the appeal to the Board of Directors for final determination.



Association of Public Treasurers of the United States and Canada

Experience Standards

	Points Earned
• Attendance at an annual conference of APT US&C	5 per year
• Attendance at a state/province APT association conference*	2 per year
• Service as a committee member for APT US&C or a state/province APT association*	1 per year per committee
• Service as a committee chair for APT US&C or a state/province APT association*	2 per year per committee
• Service as a director or parliamentarian of APT US&C or a state/province APT association*	3 per year
• Service as an officer of APT US&C or a state/province APT association*	4 per year
• Service as a mentor in the APT US&C Mentor Program	1 per year
• Earn the APT US&C Certified Public Funds Investment Manager certification	2
• Earn the APT US&C Advanced Certified Public Funds Investment Manager certification	5
• Complete a recognized national professional achievement certification program related to treasury management (e.g., CCM, CGFM, CPA, CPFO, CMA)	5 per certification
• Recipient of a special award presented by APT US&C or a state/province APT association*	5 per award
* Applicants from states/provinces that do not have an APT state/province association may substitute points from ONE statewide or province-wide organization relating to treasury management.	

Education Standards

	Points Earned
• Attend an APT US&C approved Advanced Education Program (approval and points contingent on review of program agendas by the CPFA certification chair/committee).	1 point per hour of instruction
• Write a manual for the APT US&C.	25 points per manual
• Write an article on a technical topic for the APT US&C newsletter/website. Under 500 words (1 point) 501 to 1000 words (2 points) 1001 to 1500 words (3 points) Over 1501 words (4 points)	1-4 points per article
• Presenting at a state/province association or APT US&C conference or other educational session.	2 points per hour of instruction
• Completing (with a C or better) college courses related to finance.	1 point per credit hour

All points must be earned since the last CPFA certification; all documentation must be submitted with the application. ACPFA applicants must demonstrate 15 points in experience and 45 points in the education for a total of 60 points.



Association of Public Treasurers of the United States and Canada

Experience & Education Form

Fill out this form to upload with your application, along with documentation as specified.
Include additional information as necessary.

Job Verification

PRESENT POSITION: Submit certification of election or letter verifying election or appointment to office, including dates of service to show eligibility. An APT US&C Job Verification Form may be used.

Position _____ Dates Employed _____
Employer _____ Total Years _____
Responsibilities/Job Description _____

OTHER POSITION(S) HELD SINCE LAST CPFA CERTIFICATION: Submit certification of election or letter verifying election or appointment to office, including dates of service. An APT US&C Job Verification Form may be used.

Position _____ Dates Employed _____
Employer _____ Total Years _____
Responsibilities/Job Description _____

Experience

APT US&C ANNUAL CONFERENCE OR STATE/PROVINCE CONFERENCE: Include proof of attendance.

Year _____	Conference Site _____	Total Points _____
Year _____	Conference Site _____	
Year _____	Conference Site _____	
Year _____	Conference Site _____	
Year _____	Conference Site _____	
Year _____	Conference Site _____	
Year _____	Conference Site _____	
Year _____	Conference Site _____	
Year _____	Conference Site _____	
Year _____	Conference Site _____	

COMMITTEE MEMBER/CHAIR OR DIRECTOR/OFFICER: Include proof of service.

Year _____ Position _____ Total Points _____
Association _____



Association of Public Treasurers of the United States and Canada

Year _____ Position _____

Association _____

Year _____ Position _____

Association _____

Year _____ Position _____

Association _____

APT US&C AWARD OR STATE/PROVINCE AWARD: Include proof of award.

Year _____ Award Name _____ Total Points _____

Awarding Association & Conference Site _____

CPFIM/ADVANCED CPFIM: Include proof of accreditation.

Year _____ Level _____ Total Points _____

Training Site _____

Year _____ Level _____

Training Site _____

NATIONAL CERTIFICATION PROGRAM: Include proof of certification.

Certification Name _____ Total Points _____

Date _____ Organization _____

Certification Name _____

Date _____ Organization _____

Total Experience Points (total of 15 required) _____

Education

ADVANCED EDUCATION PROGRAMS: Include proof of completion.

Course Title _____ Total Points _____

Sponsored by _____ Date of Completion _____

Course Title _____

Sponsored by _____ Date of Completion _____

Course Title _____

Sponsored by _____ Date of Completion _____

(Use additional sheets as needed.)



Association of Public Treasurers of the United States and Canada

MANUAL OR ARTICLE: Include proof of publication.

Title of Manual/Article _____ Total Points _____

Title of Publication _____

Number of words (article) _____ Date of Publication _____

Title of Manual/Article _____

Title of Publication _____

Number of words (article) _____ Date of Publication _____

PRESENTING AT A CONFERENCE OR OTHER EDUCATION SESSION: Include proof of presentation.

Title/Topic of Presentation _____ Total Points _____

Sponsoring Organization _____

Number of hours of instruction _____ Date of Presentation _____

Title/Topic of Presentation _____

Sponsoring Organization _____

Number of hours of instruction _____ Date of Presentation _____

COLLEGE/UNIVERSITY COURSES RELATED TO FINANCE: Include transcript.

Course Name/Number _____ Total Points _____

College/University _____

Grade _____ Location _____

Credit Hours _____ Date Completed _____

Course Name/Number _____

College/University _____

Grade _____ Location _____

Credit Hours _____ Date Completed _____

Total Education Points (45 required) _____

Summary

Total Experience Points (15 required) _____

Total Education Points (45 required) _____

Total Certification Points (60 required) _____



Association of Public Treasurers
of the United States and Canada

Job Verification Form

Name _____

Organization _____

Title _____

Dates of Employment _____ to _____

Duties: *If not treasury; must be administrative, supervisory or managerial; check all that apply.*

Investment of entity cash

Cash flow forecasting

Billing and collection of special assessments

Collection of receivables

Supervisor/manager

Tax collection

Banking relationship

Bond payments

Bond activity

Other (specify) _____

Signature of applicant

Date

Signature of Mayor, Manager, or Supervisor

Date

Signature of Clerk (if elected)

Date