



Association of Public Treasurers of the United States and Canada

Certified Public Finance Administrator (CPFA) New Applicant Information

The CPFA designation means that an individual is committed to education and experience. This prestigious designation is administered by the Association of Public Treasurers of the United States and Canada (APT US&C): applicants must fulfill the following requirements, submit an application online, upload any required supporting documentation, and pay their application fee.

The CPFA accreditation expires after five years; the CPFA may be maintained by continuing education and job duties per the CPFA recertification policy and form; an Advanced CPFA designation is also available.

Please visit www.APTUSC.org for more information on CPFA Re-certification and the Advanced CPFA.

Each new applicant for CPFA certification must:

1. Be 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. Be an Active Member (see APT US&C's Bylaws for definition):
 - a. For at least twenty-four months immediately before applying for certification; and
 - b. At the time of approval.
3. Believe in and practice APT US&C's Code of Ethics (as adopted).
4. Demonstrate a combined total of 100 experience and education points per the chart on the following page. A minimum of 40 points must be earned in either education or experience with a maximum of 60 points in the remaining category. Certification expires every five years and must be renewed prior to expiration.
5. 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 award.

The application deadline is June 1st and CPFA designations are formally recognized 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.



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Experience Points

Work Experience within the past 15 years, no duplicate credit for dual positions	Points	Maximum Allowed
Work Experience		
• Experience as a public treasurer as defined on the New Applicant Information sheet	4 per year	40
• Administrative, supervisory or managerial experience in government before treasury work	2 per year	20
• Administrative, supervisory or managerial experience before treasury work	1 per year	10
Total Work Experience		40
Other Experience		
Attendance at an annual APT US&C Conference	5 per year	30
Attendance at an annual APT US&C state/province affiliate association conference*	2 per year	12
Serve as a committee member for APT US&C or an APT US&C state/province affiliate association*	1 per year	5
Serve as a committee chair for APT US&C or an APT US&C state/province affiliate association*	2 per year	10
Serve as a director or parliamentarian of APT US&C or an APT US&C state/province affiliate association*	3 per year	15
Serve as an officer of APT US&C or an APT US&C state/province affiliate association*	4 per year	20
Earn a recognized national professional achievement certification program related to treasury management (e.g., CPFIM, ACPFIM, CCM, CGFM, CPA, CPFO, CFE, CIA, CMA)	5 per certification	20
Recipient of an individual service award presented by APT US&C or an APT US&C state/province affiliate association*	5 per award	15
Earn Recertification of the APT US&C CPFIM or ACPFIM certification	3	3
* 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 Points

	Maximum Allowed
Masters or Doctoral degree	40
Bachelor degree in public administration, accounting, finance or related field	25
Associate degree in public administration, accounting, finance, or related field	15
Bachelor degree in an unrelated field	15
Completion with a C grade or better of college or university courses related to treasury management (one point per semester hour)	25
Completion of an APT US&C Basic Institute (up to 50 points) AND/OR attendance at education programs pre-approved by APT US&C (assignment of points based on review of program agendas by the CPFA Certification Committee)	60
Treasury-related education by non-APT US&C affiliate state or province associations, or national organizations (such as GFOA, etc.) (one point per 4 hours of instruction)	5
Take the APT US&C Certified Public Funds Investment Manager (CPFIM) certification training	3
Take the APT US&C Advanced CPFIM (APCFIM) certification training	5



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Experience & Education Form

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

WORK EXPERIENCE

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

Position _____ Employer _____

Dates Employed: From _____ To _____ Total Years _____

Responsibilities/Job Description _____

OTHER POSITION(S) HELD IN THE LAST FIFTEEN YEARS, IF APPLICABLE:

Position _____ Employer _____

Dates Employed: From _____ To _____ Total Years _____

Responsibilities/Job Description _____

TOTAL WORK EXPERIENCE POINTS _____

OTHER EXPERIENCE

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

Year _____ Host Name _____ Location _____

Total Conference Attendance Points: _____

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

Year _____ Association _____ Position _____

Year _____ Association _____ Position _____

Year _____ Association _____ Position _____

Total Participation Points: _____



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APT US&C OR OTHER NATIONAL PROFESSIONAL ACHIEVEMENT CERTIFICATION PROGRAM RELATED TO TREASURY MANAGEMENT (e.g., CPFIM, ACPFIM, CCM, CGFM, CPA, CPGO, CFE, CIA, CMA): Include proof of accreditation.

Certification _____ Location _____ Year Earned _____

Certification _____ Location _____ Year Earned _____

Certification _____ Location _____ Year Earned _____

Total Certification Points: _____

APT US&C OR STATE/PROVINCE AFFILIATE ASSOCIATION SPECIAL RECOGNITION AWARD: Include proof of award.

Year _____ Association _____ Award _____

Year _____ Association _____ Award _____

Total Award Recipient Points: _____

Total Other Experience Points _____

TOTAL EXPERIENCE POINTS (MAXIMUM 60) _____

EDUCATION

ASSOCIATE, BACHELOR, MASTER'S OR DOCTORAL DEGREE: Include all transcripts.

Degree _____ Major _____ Date Received _____

College/University _____ Location _____

Total Degree Points: _____

COLLEGE/UNIVERSITY TREASURY MANAGEMENT COURSES: Include all transcripts.

Course Name/Number _____ Grade _____ Credit Hours _____

Date Completed _____ College/University _____ Location _____

Course Name/Number _____ Grade _____ Credit Hours _____

Date Completed _____ College/University _____ Location _____

Course Name/Number _____ Grade _____ Credit Hours _____

Date Completed _____ College/University _____ Location _____

Total Treasury Management Courses Points: _____



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APT US&C STATE AFFILIATE INSTITUTE TRAINING OR OTHER APT US&C STATE AFFILIATE EDUCATIONAL PROGRAMS: Include proof of completion and training program agenda or point tally sheets.

Name of Institute _____ Affiliate Association _____

Institute Dates: From _____ To _____ Location _____ Points Awarded _____

Name of Program/Event _____ Affiliate Association _____

Program Date(s): From _____ To _____ Location _____ Points Awarded _____

Name of Program/Event _____ Affiliate Association _____

Program Date(s): From _____ To _____ Location _____ Points Awarded _____

Name of Program/Event _____ Affiliate Association _____

Program Date(s): From _____ To _____ Location _____ Points Awarded _____

Total Institute/Education Program Points: _____

TOTAL EDUCATION POINTS (maximum 60) _____

Summary

Total Experience Points _____

Total Education Points _____

TOTAL CPFA CERTIFICATION POINTS (minimum of 100) _____