



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 finance related 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.

To receive recognition at the APT US&C Annual Conference, the application deadline is June 1; however, applications are accepted any time throughout the year.

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 info@aptusc.org 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. If final determination is that the application is not approved, the applicant will be given one-year to re-submit without an additional application fee, to earn the required points for reconsideration.



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Experience Points

| Work Experience within the past 15 years , no duplicate credit for dual positions. | Points | Maximum Allowed |
|---|---------------------|-----------------|
| Work Experience | | |
| <ul style="list-style-type: none"> Experience as a public treasurer as defined on the New Applicant Information sheet 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 charged with the performance or supervision of any investments, debt, or finance activities. | 4 per year | 40 |
| <ul style="list-style-type: none"> Administrative, supervisory or managerial experience in government before treasury work | 2 per year | 20 |
| <ul style="list-style-type: none"> Administrative, supervisory or managerial experience before treasury work | 1 per year | 10 |
| Total Work Experience | | 40 |
| Other Experience | | |
| Attendance at an APT US&C Annual Conference | 5 per year | 30 |
| Attendance at an APT US&C Annual Affiliate Conference (determined as where the annual election/membership meeting is held)* | 2 per year | 12 |
| Serve as a committee member for APT US&C or an Affiliate Association* | 1 per year | 5 |
| Serve as a committee chair for APT US&C or an Affiliate Association* | 2 per year | 10 |
| Serve as a director or parliamentarian of APT US&C or an Affiliate Association* | 3 per year | 15 |
| Serve as an officer of APT US&C or an 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 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 US&C Affiliate Association may substitute points from one other organization who provides treasury management support and continuing education. | | |

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 sponsored by non-APT US&C Affiliate Association (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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Certified Public Finance Administrator (CPFA) Application

Fill out this form to upload with your application, along with documentation as specified.

Date _____ Applicant Name _____

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 _____

Responsibilities/Job Description _____

Dates Employed: From _____ To _____ Total Years _____ Total Points (4 per year) _____

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

Responsibilities/Job Description _____

Position _____ Employer _____

Dates Employed: From _____ To _____ Total Years _____ Total Points (4 per year) _____

Total Work Experience Points: _____

OTHER EXPERIENCE

Attendance at APT US&C **Annual Conference** (4 pts per year) or **STATE/PROVINCE Annual Conference** (2 pts per year). Include proof of attendance.

Year _____ Host _____ Training _____ Points _____

Total Attendance Points: _____

Service as **Committee Member** (1 pt per year), **Committee Chair** (2 pts per year), **Board Director** (3 pts per year), **Board Officer** (4 pts per year). Include proof of service.

Year _____ Association _____ Position _____ Points _____

Year _____ Association _____ Position _____ Points _____

Year _____ Association _____ Position _____ Points _____

Total Service Points: _____



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APT US&C or other National **Professional Certification** related to treasury management (e.g., CPFIM, ACPFIM, CCM, CGFM, CPA, CPGO, CFE, CIA, CMA) (5 pts for initial; 3 pts for re-certification). Include proof of accreditation.

Certification _____ Sponsor _____ Year Earned _____

Certification _____ Sponsor _____ Year Earned _____

Certification _____ Sponsor _____ Year Earned _____

Total Certification Points: _____

APT US&C or Affiliate Association **Special Award Recognition** (5 pts per 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 or Affiliate **Annual Conference**; APT US&C Affiliate **Institute Training** (complete 100 hours = 50 points); or other treasury related training programs (in person or virtual). Include proof of attendance and hours of attendance and training program descriptions. (1 point for every 2 hours of education; or non-APT/Affiliate: 1 point for every 4 hours of education)

Training _____ Host _____

Training Date(s): _____ Location _____ Points _____

Training _____ Host _____

Training Date(s): _____ Location _____ Points _____

Training _____ Host _____

Training Date(s): _____ Location _____ Points _____

Training _____ Host _____

Training Date(s): _____ Location _____ Points _____

Training _____ Host _____

Training Date(s): _____ Location _____ Points _____

Training _____ Host _____

Training Date(s): _____ Location _____ Points _____

Training _____ Host _____

Training Date(s): _____ Location _____ Points _____

Total Training Points: _____

TOTAL EDUCATION POINTS (maximum 60) _____

Summary

Total Experience Points _____

Total Education Points _____

TOTAL POINTS (minimum of 100) _____



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Job Verification Form

Name _____ Entity _____

Title _____ Employment Dates: _____ to _____

Duties: If not treasury or finance, 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
- _____ Tax collection
- _____ Supervisor/manager
- _____ 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 _____