



## Association of Public Treasurers of the United States and Canada

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### **Certified Public Finance Administrator (CPFA) Recertification 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): the certification expires every five years. To maintain certification, applicants must fulfill the following requirements, submit an application online, upload any required supporting documentation, and pay the application fee.

An Advanced CPFA designation is also available. Please visit [www.APTUSC.org](http://www.APTUSC.org) if you are a first time CPFA applicant or for more information on the Advanced Accreditation.

#### **Applicant for CPFA re-certification must:**

1. In each of the five years since last certified, have been the:
  - 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 activities.
  - b. Employee of an institution or organization whose operations are closely allied with or related to the functions of a treasurer's office.
2. Have maintained continuous Active or Associate membership (see APT US&C's Bylaws for definition):
  - a. Every year since last certification; and
  - b. At the time of approval.
3. Believe in and practice APT US&C's Code of Ethics.
4. Demonstrate 50 points in any combination of experience and education points since the last certification.
5. Submit a non-refundable fee of \$125. 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](mailto: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.*



## Association of Public Treasurers of the United States and Canada

### Experience Points

<i>All points must be earned since last CPFA certification</i>	Points	Maximum Allowed
<b>Work Experience</b>		
Experience as a public treasurer as defined on the Re-certification Information sheet	4 per year	20
<b>Other Experience</b>		
Earn a recognized national professional achievement certification program related to treasury management (e.g., CPFIM, ACPFIM, CCM, CGFM, CPA, CPFO, CMA)	5 per certification	20
Attendance at an APT US&C Annual Conference	5 per year	25
Attendance at an APT US&C Affiliate Annual Conference* (determined as where the annual election/membership meeting is held)*	2 per year	10
Service as a committee member for APT US&C or an APT US&C Affiliate Association*	1 per year per committee	5
Service as a committee chair for APT US&C or an APT US&C Affiliate Association*	2 per year per committee	10
Service as a director or parliamentarian of APT US&C or an APT US&C Affiliate Association*	3 per year	15
Service as an officer of APT US&C or an APT US&C Affiliate Association*	4 per year	20
Recipient of an individual service award presented by APT US&C or APT US&C Affiliate Association*	5 per award	10
* 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

<i>All points must be earned since last CPFA certification</i>	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 Institute AND/OR attendance at education programs pre-approved by APT US&C (assignment of points based on review of program agendas by the CPFA Committee Chair)	40
Treasury-related education by non-APT US&C Affiliates (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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**Certified Public Finance Administrator (CPFA) Recertification 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 \_\_\_\_\_

Year \_\_\_\_\_ Host \_\_\_\_\_ Training \_\_\_\_\_ Points \_\_\_\_\_

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:** \_\_\_\_\_

## 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 \_\_\_\_\_

**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:** \_\_\_\_\_

## Summary

Total Experience Points: \_\_\_\_\_

Total Education Points: \_\_\_\_\_

**TOTAL POINTS:** \_\_\_\_\_ **(50 minimum points needed)**