

2017 APT US&C Annual Conference Schedule

Sunday, July 23, 2017

8:00 am – 5:00 pm CPFIM Training (8 hours of class time)
Presented by Jim Koetting, Public Funds Investment Tracking and Reporting
(4 CPFA points / 8.0 CPE credits)
CPFA points earned____ CPE credits earned____

1:00 pm – 5:00 pm Cash Handling Workshop
Presenter: Anthony Francisco
(2 CPFA points/4.0 CPE credits)
CPFA points earned____ CPE credits earned____

Total Sunday, July 23rd, 2017 Points earned: CPFA____ CPE____

Monday, July 24, 2017

8:30 am – 9:30 am Keynote Address: From Traditionals to Millennials: Leading Generations at Work
(.50 CPFA points/1.0 CPE credit)
CPFA points earned____ CPE credits earned____

10:00 am – 11:00 am General Session: Current Fraud Trends
(.50 CPFA points/1.0 CPE credits)
CPFA points earned____ CPE credits earned

11:05 am – 12:05 pm Panel Discussion: Funding with a Purpose
(.50 CPFA points/1.0 ACPFA points/1.0 CPE credits)
CPFA points earned _____ ACPFA points earned _____ CPE credits earned____

1:30 pm – 2:30 pm Breakouts

1. **Investment Update in this Market**
(.50 CPFA points /1.0 ACPFA points/1.0 CPE credits)
CPFA points earned____ ACPFA points earned____ CPE credits earned____

2. **Banking RFP Design**
(.50 CPFA points / 1.0 CPE credits)
CPFA points earned____ CPE credits earned____

3. **Cyber Security Challenges, Questions, and Answers**
(.50 CPFA points/1.0 ACPFA points/1.0 CPE credits)
CPFA points earned____ ACPFA points earned____ CPE credits____

3:00 pm – 4:00 pm Breakout Sessions

1. **Investment Update in this Market**
(.50 CPFA points/1.0 ACPFA points/1.0 CPE Finance points)
CPFA points earned____ ACPFA points earned____ CPE credits earned____

2. **The Future of Consumer Payments, Mobile Payments, Same-Day ACH, EMV Chips, PINS, Signature**

(.50 CPFA points/1.0 CPE credits)

CPFA points earned____ CPE credits earned____

3. **Investing and Technology** Presenter: Peter Yanez, Multi-Bank Securities

(.50 CPFA points/1 ACPFA points/1.0 CPE credits)

CPFA points earned____ ACPFA points earned____ CPE credits earned____

4:05 pm – 5:05 pm Breakout Sessions

1. **Benchmarking and Investment Strategy Development**

Presenter: Jason Klinghoffer, Mischler Financial

(.50 CPFA points/1 ACPFA points/1.0 CPE credits)

CPFA points earned____ ACPFA points earned____ CPE credits earned____

2. **Cyber Security Challenges, Questions, and Answers**

(.50 CPFA points/1 ACPFA points/1.0 CPE credits)

CPFA points earned____ ACPFA points earned____ CPE credits earned____

Tuesday, July 25, 2017

9:00 am – 10:00 am Breakout Sessions

1. **Words of Wall Street: The Language of Fixed Income Investing**

Presenter: Greg Warner, First Southwest Asset Management

(.50 CPFA points/1.0 ACPFA points/1.0 CPE credits)

CPFA points earned____ ACPFA points earned____ CPE credits earned____

2. **E-Government Solutions**

Presenters: Maria Cuevas and Jenna Coates, NIC Services

(.50 CPFA points/1.0 CPE credits)

CPFA points earned____ CPE credits earned____

10:30 am – 11:30 am Breakout Sessions

1. **Cash Management Issues: Treasurer to Treasurer Panel for Municipalities with Populations of 15,000 or more**

(.50 CPFA points / 1.0 CPE credits)

CPFA points earned____ CPE credits earned____

2. **Cash Management Issues: Treasurer to Treasurer Panel for Municipalities with Populations below 15,000**

(.50 CPFA points/1.0 CPE credits)

CPFA points earned____ CPE credits earned____

11:35 am – 12:35 pm Breakout Sessions

1. Investing for Small Governments

Presenter: John Grady, Public Trust Advisors

(.50 CPFA points/1.0 CPE credits)

CPFA points earned____ CPE credits earned____

2. Selecting Software in Today's Market

Presenter: Spencer Arnesen, SoftResources

(.50 CPFA points/1.0 CPE credits)

CPFA points earned____ CPE credits earned____

3. The Future of Great Fiscal Stewardship

Presenter: Jim Koetting, PFITR

(.50 CPFA points/1.0 ACPFA points/1.0 CPE credits

CPFA points earned____ ACPFA points earned____ CPE credits earned____

2:00 pm – 3:00 pm Breakout Sessions

1. Fixed Income Investing in a Time of Rising Interest Rates,

Presenter: John Burford, Palm Beach County

(.50 CPFA points/1.0 ACPFA points/1.0 CPE credits)

CPFA points earned____ ACPFA points earned____ CPE credits earned____

2. Selecting Software in Today's Market

Presenter: Spencer Arnesen, SoftResources

(.50 CPFA points/1.0 CPE credits)

CPFA points earned____ CPE points earned____

3. Leveraging Technology to Improve Issuer Access to the Capital Market

Presenter: Gregg Bienstock, Lumesis

(.50 CPFA points/1.0 ACPFA point /1.0 CPE credit)

CPFA points earned____ ACPFA points earned____ CPE credits earned____

3:05 pm – 4:05 pm General Session

Family Medical Leave Act

Presenter: William L. Richardson, US Dept. of Labor

(.50 CPFA points/1.0 CPE credits)

CPFA points earned____ CPE credits earned____

4:10 pm - 5:10 pm General Session

Economic Outlook

Presenter: Sean Snaith, University of Central Florida

(.50 CPFA points/.0 ACPFA points/1.0 CPE credits)

CPFA points earned____ ACPFA points earned____ CPE credits earned____

Wednesday, August 17, 2016

8:00 am – 12:00 pm ACPFIM Training (4 hours of classroom time)

Presenter: Jim Koetting

(2.0 CPFA points/4 ACPFA points/4.0 CPE credits)

CPFA points earned_____ ACPFA points earned_____CPE credits earned_____

8:00 am – 12:00 pm Internal Controls Training (3 hours of classroom time)

(1.5 CPFA points / 3.0 CPE credits)

CPFA points earned_____ CPE credits earned_____