



2019 Annual Conference Point Tally Sheet

July 14-17 • Oklahoma City, Oklahoma

Speaker/Topic	Description	Class Hours	CPFA Points	ACFPA Points	Points Earned
Sunday, July 14, 2019 and Wednesday, July 17, 2019					
Greg Prost <i>CPFIM Training</i> (Sunday Only)	This nationally recognized certification program is designed to provide the confidence and knowledge to manage your investments better. Learn about: investment instruments; banks, brokers and advisors; cash flow; governance and your investment policy; safety, liquidity and yield; and defining your strategy.	6	3		
Greg Prost <i>ACPFIM Training</i> (Wednesday Only)	Take your understanding even further with the Advanced CPFIM training. With a deep look into analysis and investment strategy, attendees will gain a more thorough knowledge of how to quantify an investment policy objective and the tools needed to achieve it.	4	2	2	
Michael Pettigrew <i>Cash Handling Training</i> (Sunday and Wednesday)	Designed for treasury and finance officers to assess, document and enhance their internal controls program. Attendees will learn how to develop an internal controls policy and utilize internal controls checklists to outline an entity's control environment.	4	2		
Anthony Francisco <i>Internal Controls Training</i> (Sunday and Wednesday)	Perfect for first-line cash handlers, treasurers and other personnel responsible for handling cash. Topics include fraud deterrent, currency and check recognition, electronic payment mechanisms, internal controls and relevant legislation.	4	2		
Monday, July 15, 2019					
Matt Booth <i>CYA: Check Your Attitude</i>	Success comes to people not because they are smarter or more talented than you, but because they can communicate their ideas clearly and thus gain buy-in from staff and co-workers. Virtually every facet of your personal and professional life hangs on your ability to communicate.	1.5	.75		
Drew Simmons and Andrew Okolski, The Baker Group <i>Best Practices in Debt Management and Investment Management</i>	This session will address best practices on what should be considered when bringing bonds to market as well as managing existing debt structures. On the asset side, the investment strategy should begin with an educational framework for municipal officials to use when investing public funds and then identify the risk/reward profile for all suitable investments that are unique to the needs of the balance sheet.	1.25	.63		
BREAKOUT Scott McIntyre, Hilltop Securities <i>Risk and Opportunity: Investing in an Uncertain Market</i>	This presentation will describe Fed interest rate policy, rate history and the current issues shaping it. We'll discuss common investment options and how to safely maximize earnings. We'll also explore the investment-related risks local government investors face, and look at methods and resources to help mitigate these potential problems.	1.0	.5		
BREAKOUT Matt Bowler, Oklahoma State University <i>Strengthening Your Network</i>	The key to a properly structured professional network lies in the type of relational ties that we have and can develop. This seminar will demonstrate the importance of relationships in building your career, emphasize the benefits of a properly structured professional network, and examine how to develop the right types of relationships with the right kinds of people.	1.0	.5		

Speaker/Topic	Description	Class Hours	CPFA Points	ACPFA Points	Points Earned
Monday, July 15, 2019 continued					
BREAKOUT Brian Anderson, JP Morgan Chase <i>Fraud Trends and Prevention</i>	Fraudsters are consistently looking for opportunities to exploit payment systems. An industry veteran reviews an array of mechanisms that Treasury and Accounting practitioners may utilize in order to minimize risk and prevent fraudulent payments; including how corporates and FI's are leveraging tools such as Early Warning Services, Artificial Intelligence, industrial-strength fraud filters, as well as common-sense procedures.	1.0	.5	.5	
BREAKOUT Damien Grant, Multi-Bank Securities and Denise de Bombelles, FHLB <i>Investment Strategies and the Role of FHLB</i>	Treasurers will learn about tools and strategies available to help protect their portfolio's safety, liquidity and yield in any rate environment. This informative presentation will also include an overview of the Federal Home Loan Banks (FHLB) system and their debt programs.	1.0	.5		
Jim Huntzinger, BOK Financial <i>Economic and Market Update</i>	Current economic and market conditions in the United States and around the globe will be reviewed as well as a focus on trends that can help understand what the economy may look like over the next year.	1.0	.5	.5	
Tuesday, July 16, 2019					
Kenton Tsoodle, City of Oklahoma City <i>Regulations Update</i>	The Securities and Exchange Commission recently amended the rules for continuing disclosure related to state and local government bonds. This presentation discusses the rule changes and what issuers can do to be prepared.	1.0	.5		
Charles Kerns, Oklahoma Department of Emergency Management <i>Business Continuity Before, During and After a Disaster</i>	Everyone knows you need to have a plan in place for if-or-when a disaster strikes. Don't miss this session to make sure you know all the ins and outs of not just how to prepare for a disaster, but how to ensure that your department will be ready and able to continue to function and provide service before, during, and after a disaster.	1.0	.5		
William Wind, U.S. Secret Service <i>Current Financial Crime Trends</i>	Hear the most up-to-date information on current transnational trends in electronic and financial crimes from a special agent in the United States Secret Service.	1.0	.5		
BREAKOUT Keith Sawdon <i>Cash Flow Forecasting</i>	Attendees will learn the essentials to building a Cash Flow Forecasting model using forecast cash flows; having a successful investment program will also be explored and explained. The session will demonstrate how to compare a cash flow forecast with current investment holdings to use as a guide in adjusting and rebalancing future investment holdings to meet cash flow requirements.	1.0	.5		
BREAKOUT Marie Autphenne, Raymond James <i>Municipal Debt Management from the Buyers Perspective</i>	In this session we will discuss municipal credit trends, conditions, and fundamentals. We will discuss the technicals of the market to identify opportunities and discuss ways to minimize risk in municipal bond investing and ongoing credit surveillance.	1.0	.5	.5	
Jeffrey Collins <i>Do the Right Thing: Make Ethics Your Brand</i>	Don't miss this session that presents ethics in a manner you've never seen before - make sure to hear this thought-provoking and wonderfully direct presentation on the best practices for creating, maintaining and enhancing an ethical workplace. Attendees will learn methods to spot ethical red flags and receive guidance in navigating ethical dilemmas.	1.0	.5		