



2021 Annual Conference Point Tally Sheet

July 18-21 • South Bend, Indiana

Speaker/Topic	Description	Class Hours	CPFA Points	ACPFPA Points	Points Earned
Sunday, July 18, 2021 and Wednesday, July 21, 2021					
Greg Prost CPFIM Training (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 ACPFIM Training (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.	5	2.5	5	
Monday, July 19, 2021					
Dancer to Commando Terry Vaughan 9:30-10:30 am EST	Each of us has to face personal challenges every day, and it can be hard to find a strategy to overcome those hurdles. Whether you succeed or fail depends on your mindset. Terry will help you discover your Commando spirit and ultimately triumph over any obstacle.	1.0	.5		
Ring Around the "White" Collar Christopher Knight, FBI 10:45-11:45 am EST	This session will explore the definitions, sociological theories, and characteristics of white-collar crime, as well as how fraud examiners go about investigating it.	1.0	.5		
BREAKOUTS BY MUNICIPAL SIZE (3) Treasurer-to-Treasurer Peer Networking 12:00-1:00 pm EST	Bring your questions and discussion points! These breakout sessions are designed to promote the sharing of issues and best practices. The best way to learn from your peers is to participate in these breakout groups.	1.0	.5		
Building Effective Relationships in a Changing World of Online Networking Jenna Knepper, AIM 2:00-3:00 pm EST	Building relationships between municipal members and legislators is critical to establishing a partnership between state and local units of government. This workshop will walk through a variety of methods to establish and cultivate relationships between municipal members and legislators, including utilizing social media and virtual meeting platforms.	1.0	.5		
Take Control of Your Escrow Property Tax Collections David Culver, Autoagent Data Solutions 3:15-4:15 pm EST	Let's talk about the Escrow collection process and how to make it run smoothly in your office. We'll offer tips and best practices for proven results.	1.0	.5		
Common Mistakes in Managing Your Investment Portfolio, Scott McIntyre, Hilltop Securities 4:30-5:30 pm EST	This session will discuss missteps and misconceptions in investment policy and strategy, banking and safekeeping, broker selection and trading. By sharing stories of common mistakes, participants can avoid making the same mistakes themselves.	1.0	.5	1.0	



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Tuesday, July 20, 2021					
Real World Case Studies: Investing and Portfolio Management <i>Jason Click & Jason Headings, Meeder Investments</i> 9:30-10:30 am EST	One of the best forms of education is learning from the successes and struggles of others. This session will walk through several real-life examples, both good and bad, of issues faced by fiscal officers. These case studies will include determining cash versus core investment portfolios, project funds, business continuity, knowing the roles of services providers, and communication and self-advocacy related to banking.	1.0	.5	1.0	
BREAKOUT On the Horizon and Beyond – Charting GASB’s Course <i>Britni McDole, Plante Moran</i> 10:45-11:45 am EST	GASB standards and their implementation can be complex. We’ll introduce upcoming GASB standards that will be applicable in the next few years and help attendees understand how the latest financial reporting developments will affect organizations. We’ll also provide insight regarding other current GASB projects that may have an impact in the future.	1.0	.5	1.0	
BREAKOUT HR Challenges and Solutions <i>Gregg Hixenbaugh, Attorney-at-Law</i> 10:45-11:45 am EST	The field of human resources is ever changing (sometimes seemingly from moment to moment). This presentation will focus on evolving topics related to human capital management, with a particular focus on the unique challenges confronted by human resources professionals in a governmental setting.	1.0	.5		
Economic Update: What’s New - Preparing for a Recession <i>Thomas Gresik, University of Notre Dame</i> 12:00-1:00 pm EST	Corporate income taxes have widespread economic effects. In this presentation, Professor Gresik will describe the economy-wide effects of changes in corporate tax policy, and lay out the positive and negative effects for both national and local economies.	1.0	.5	1.0	
BREAKOUT Bond Disclosures and Pricing – What’s New and Leading Practices <i>Susan Reed, J.D. & Jesse Nelson, CPA, Baker Tilly</i> 2:30-3:30 pm EST	Disclosure has always been important for municipal issuers, but there are increasing requirements and regulatory oversight in the current environment. This session will cover trending topics regarding disclosure operating procedures, voluntary disclosures, environmental, social and corporate governance (ESG) disclosure considerations and investor relations. How financings are structured is critical and brings different results for issuers. Being strategic in structuring debt helps issuers achieve optimal results. Learn about these key considerations, best practices and impacts when a financing structure is developed.	1.0	.5	1.0	
BREAKOUT Digital Transformation for Municipalities <i>John Globensky, Treasurer City of Grand Rapids, MI</i> 2:30-3:30 pm EST	“What if...?” Have you found yourself or your team using this phrase? Why does it take a disaster or crisis to enact change? This session will discuss digital transformation opportunities and its benefits. We’ll investigate the options and ways to begin having the conversation of how to change before a crisis so you and your team can avoid having to use the phrase “Why didn’t we?”	1.0	.5	1.0	
Best Practices for Safeguarding Against Network Intrusions <i>Brian Phillips, U.S. Secret Service (USSS)</i> 3:45-4:45 pm EST	Take an in-depth journey on an investigation of the simple and complex threats to your organization’s cyber-health. The US Secret Service has resources to help if/when your municipality comes under attack. But being informed is always the best option: you’ll learn about fraudulent domestic and international wires, what C-	1.0	.5	1.0	



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<p>CONTINUED Best Practices for Safeguarding Against Network Intrusions Brian Phillips, U.S. Secret Service (USSS) 3:45-4:45 pm EST</p>	<p>Suites should realize about being a primary target for phishing/whaling attacks, BEC (wiring instructions to wire a payment to another routing number), and Ransomware (not only encrypted servers and networks, but coercive tactics where the bad actor will publish proprietary information (customer/vendor financial relationships and transactions, as well as PII and medical). Learn that personnel who have anything to do with finance should “lock arms” with the Chief Information Security Officer to ensure both capital and data are protected: data is now the “new” currency. Government’s response to Ransomware now includes a resource: https://www.stopransomware.gov.</p>				
Wednesday, July 21, 2021					
<p>Mastering Body Language for Leaders Terry Vaughan 9:30 am-12:30 pm EST</p>	<p>On average, we will meet 80,000 people in our lifetime! That’s 80,000 opportunities for either a good or bad interaction. Yet, body language is often the most overlooked and under-appreciated means through which we make a connection, inspire change, or positively impact other people. This in-depth session will provide a framework of strategies for leaders to use in order to improve nonverbal interpretation and ensure that every communication is a success.</p>	3.0	1.5	3.0	