

APT US&C 58TH ANNUAL CONFERENCE

AUGUST 11-14, 2024 • GREENVILLE, SOUTH CAROLINA



Building Connections & Bridging Strengths

Association of Public Treasurers of the United States & Canada

in Partnership with the South Carolina Municipal Finance Officers, Clerks & Treasurers Association



WELCOME TO THE 58TH ANNUAL CONFERENCE

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Mission

“To provide quality treasury management education and training, professional certification, peer interaction, and professional connection opportunities for public treasury and financial officials.”



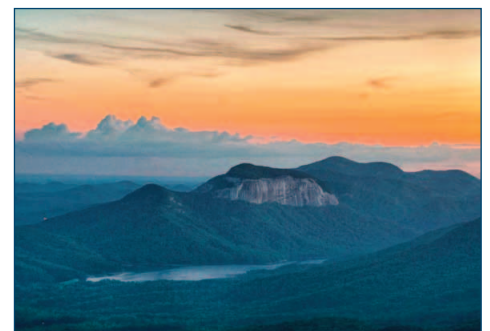
Founded in 1965, APT US&C represents public treasury and finance officials in local, county, and state/provincial governments throughout North America. The Association provides educational seminars and conferences, publications, policy and legislative information, and technical assistance to members. This includes four nationally recognized certifications: Certified Public Finance Administrator (CPFA), Advanced CPFA, Certified Public Funds Investment Manager (CPFIM) and Advanced CPFIM as well as policy certifications and training. Visit APTUSC.org for more information.

Welcome to Greenville!

Greenville is known for its delicious food and drink, quaint Main Street, bustling art scene, picturesque parks, and sweet Southern hospitality. The 58th Annual Conference will capitalize on all that the City has to offer while still providing attendees time to discover their own favorite places.

The Hyatt Regency is conference headquarters and is in the middle of downtown within walking distance to plenty of restaurants, pubs, and shops. Walk or take the downtown trolley line as you explore. The Reedy River, featuring waterfalls and a pedestrian bridge, crosses a downtown filled with public parks and the 23 mile biking and walking “Swamp Rabbit Trail.”

Attendees who arrive early or stay late will have an easy drive to both the mountains and the beach for fun exploring. Choose between the Blue Ridge Mountains, the beaches of Hilton Head or Myrtle Beach, or the historic city of Charleston - all are only a few hours drive. Discover more of Greenville online at visitgreenvillesc.com.



PRESIDENT'S MESSAGE



Welcome to our 58th Annual Conference! We're so happy to be in Greenville in partnership with our state affiliate, the South Carolina Municipal Finance Officers, Clerks & Treasurers Association.

This year's conference theme is "Building Connections and Bridging Strengths." This is a reflection of the beautiful pedestrian bridge that amazed all of us at the river park oasis right in the middle of downtown Greenville. It's also what the Association works so hard to provide: building professional connections between all of us who are involved in public treasury in order for us to grow stronger.

As the President of APT US&C over the last year, I have focused on strengthening relationships to help continue providing what our members need: training, certifications, and networking. This has hopefully also led to connections that support our personal growth and strengthen our organizations.

I'm incredibly proud of our Board of Directors, as they have engaged with their responsibilities and have often surpassed my expectations. Our executive members have also been incredibly committed to visiting all of our state affiliate conferences to make sure we're connecting with you not only at our events but also on your home turf. We thank you for those opportunities and for welcoming and getting to know us as we visit your state events. We learn so much from you and your members and look forward to continuing this outreach.

The association has had a lot of successes this year - increased membership, more certifications, continued in-person and online training, new training topics and plans for more additions in the future. Our Annual Report will review these accomplishments more completely, and I hope you'll check it out, either during or after the conference. The Annual Report is available printed as well as on the APTUSC.org website.

I would like to thank our Annual Conference Chair, Heather Gale, and the planning committee members. The conference wouldn't exist without the imagination, ideas, work, and follow-through of these wonderful people (a full list is on page 16). We appreciate their leadership and guidance!

We remain humbled and grateful for the support and collaboration of our corporate members and sponsors - you are all vital to our success. I appreciate your involvement and commitment to educating our conference attendees and building relationships with us and our members throughout the year. I encourage all our attendees to visit the Exhibit Hall and attend the Exhibitor Reception after our last session on Monday. Strike up a conversation with someone you don't know - you'll start a relationship and learn about a product or service in the process.

Please join us for this year's Awards Ceremony on Tuesday evening. We will transition the Association's leadership through the installation of our 2024-25 Board of Directors and present awards and certifications to celebrate our peer's accomplishments.

I have truly enjoyed my time as President and the relationships it has allowed me to create and strengthen. As is often the case with servant leadership, I feel as though I have benefited the most in the end. I thank you for the honor and the privilege of serving as the APT US&C President. I look forward to seeing you in the coming years as we continue *building our connections and bridging our strengths*.

Best Always,

A handwritten signature in black ink that reads "Tricia Wiggle-Bazzy". The signature is written in a cursive, flowing style.

Tricia Wiggle-Bazzy
APT US&C President
Treasurer, Green Oak Charter Township, Michigan

CONFERENCE SCHEDULE

Saturday, August 10

1:00 pm - 5:00 pm Registration Ballroom Foyer

Sunday, August 11

8:00 am - 4:00 pm Registration Ballroom Foyer

10:00 am - 1:00 pm **Discover Greenville Walking Tour & Luncheon at Fluor Field** Meet in Hyatt Atrium/Lobby

2:00 pm - 8:00 pm Exhibitor Set-Up Studio 220, Second Floor

4:30 pm - 5:30 pm Affiliate Presidents Meeting Think Tank, Second Floor

6:00 pm - 9:00 pm **Welcome Reception** The Avenue, 110 E. Court Street

Monday, August 12

8:00 am - 9:30 am **Exhibit Hall Open** Studio 220, Second Floor

8:30 am - 9:30 am Breakfast Studio 220, Second Floor

8:00 am - 9:00 am Registration Ballroom Foyer

9:30 am - 10:00 am **Presentation of Colors & Opening Remarks** Regency Ballroom, CDE

10:00 am - 11:00 am **Opening Keynote Address: Be Unstoppable!** Regency Ballroom, CDE
Alex Weber

11:00 am - 11:15 am Break

11:15 am - 12:30 pm **Affordable Housing & the Role of the Treasurer's Office** Regency Ballroom, CDE
Bryan Brown, Greenville Housing Fund; Ginny Stroud, United Bank; Patricia Dennis, City of Greenville; Racquel Collier, Caliber Real Estate

12:30 pm - 1:30 pm **Exhibit Hall Open** Studio 220, Second Floor

12:30 pm - 1:30 pm Lunch Studio 220, Second Floor

1:30 pm - 2:30 pm **Concurrent Sessions**

Market Myths & Treasury Truths Regency Ballroom, CDE
Jason Click/Mike Kloack, Meeder Investment

How to Utilize 115 Trusts as a Recruiting & Retention Tool Regency Ballroom, FGH
Joel J. Babbitt, NPPFA (National Public Pension Fund Association)

2:30 pm - 2:45 pm Break

2:45 pm - 4:45 pm **Artificial Intelligence - How to Use in Treasury & Finance** Regency Ballroom, CDE
Anthony Moggio, City of Rochester, Michigan

5:00 pm - 6:00 pm **Exhibitor & Sponsor Reception** Studio 220/The Roost (outdoor)

All educational sessions and exhibit hall are at the Hyatt Regency. Times are in the Eastern Time Zone.

General and concurrent sessions in the CDE Regency Ballroom will be livestreamed to virtual attendees. Schedule subject to change.

Navigating the Conference

Welcome to the Hyatt Regency! We hope you enjoy the amazing atrium and the fantastic location right on the main shopping and restaurant district of downtown Greenville. Registration and main sessions will be on the lower level of the hotel; conference sessions will be in the Regency Ballroom. Breakout sessions will be right next to the main ballroom. Across the atrium and upstairs on the mezzanine level (which is also street level) is the Studio 220 - this beautiful space is home to the Exhibit Hall and both breakfast and lunch. See diagrams at right for more detail.

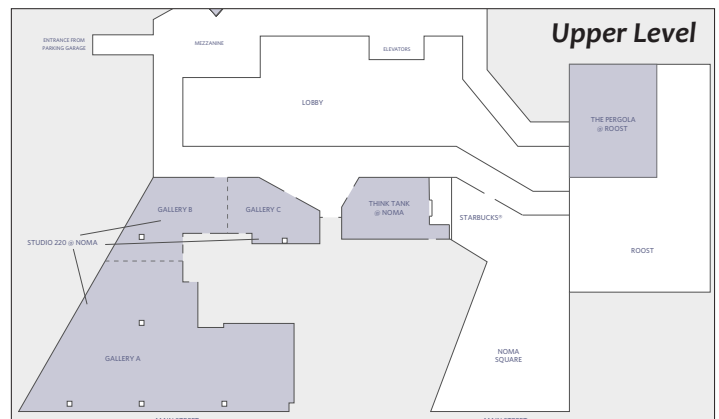
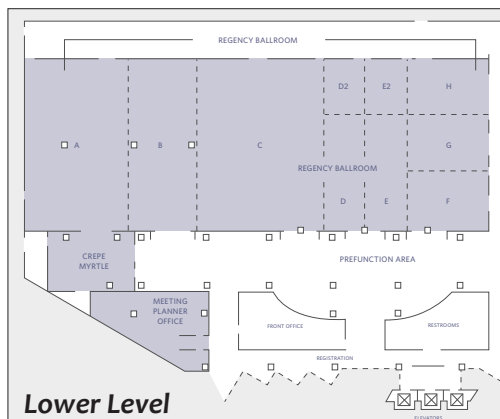
CONFERENCE SCHEDULE

Tuesday, August 13

8:00 am - 9:30 am	Exhibit Hall Open	Studio 220, Second Floor
8:30 am - 9:30 am	Breakfast	Studio 220, Second Floor
9:30 am - 10:30 am	Fraud in Local Government	Regency Ballroom, CDE
	<i>Beth A. Wood, Greg W. Isley CPA, PA</i>	
10:30 am - 10:45 am	Break	
10:45 am - 11:45 am	Concurrent Sessions	
	Liability Driven Investing (LDI) Solutions for Public Pensions	Regency Ballroom, CDE
	<i>Mica Owens, Hilltop Securities; Hector Negroni, Foundation Credit</i>	
	GASB Updates: Just Doing It	Regency Ballroom, FGH
	<i>Larry Finney, Greene Finney Cauley, LLP</i>	
11:45 am - 1:00 pm	Exhibit Hall Open	Studio 220, Second Floor
11:45 am - 1:00 pm	Lunch	Studio 220, Second Floor
12:30 pm - 1:00 pm	Annual Meeting - APT US&C Members to Attend	Regency Ballroom, CDE
1:00 pm - 2:00 pm	Unified Response: How Everyone Contributes to Emergency Management. ...	Regency Ballroom, CDE
	<i>Jessica Stumpf, Emergency Management, Greenville County</i>	
1:30 pm - 5:00 pm	Exhibitor Breakdown	Studio 220, Second Floor
2:00 pm - 2:15 pm	Break	
2:15 pm - 3:15 pm	Concurrent Sessions	
	Trends in Banking	Regency Ballroom, CDE
	<i>Greg Prost, Robinson Capital Management</i>	
	The Evolving Landscape of Fraud Prevention: Latest Insights & Strategies ...	Regency Ballroom, FGH
	<i>Sierra Lindgren, Paymerang</i>	
3:15 pm - 3:30 pm	Break	
3:30 pm - 4:30 pm	Economic Update	Regency Ballroom, CDE
	<i>Charlie Dougherty, Wells Fargo Corporate and Investment Bank</i>	
6:00 pm - 9:00 pm	Awards Banquet & Installation of Officers	Regency Ballroom, CDE

Wednesday, August 14

8:30 am - 9:30 am	Breakfast	Regency Ballroom, CDE
9:30 am - 10:30 am	Cyber Threats and Security	Regency Ballroom, CDE
	<i>Cindy Starns, Federal Bureau of Investigation</i>	
10:30 am - 10:45 am	Break	
10:45 am - 12:30 pm	Creating More Capacity and Enhancing Well-Being	Regency Ballroom, CDE
	<i>Caleb Campbell, Closing Keynote Speaker</i>	
1:00 pm - 6:00 pm	Advanced CPFIM Training	Magnolia
	<i>Greg Prost, Robinson Capital Management, LLC</i>	



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National Public Pension Fund Association

nppfa.org

Joel Babbitt • info@nppfa.org • 630-784-0406

Founded in 2019, the NPPFA developed its roots in a state specific not-for-profit umbrella organization representing police and fire defined benefit retirement funds in 1985. As the demand grew for prudent stewardship over governmental deferred compensation 457 plans, the NPPFA was established to offer training, services, and support to pension trustees and their organizations.



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Adam McCauley
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Total assets under management include 7,349 local government investment pool participants at \$75.08 billion and 221 SMA clients at \$13.89 billion. Source: Public Trust Advisors, LLC. Data as of 03/31/2024. Data unaudited. Many factors affect performance including changes in market conditions and interest rates and in response to other economic, political, or financial developments. Investment involves risk including the possible loss of principal. No assurance can be given that the performance objectives of a given strategy will be achieved. The information presented should not be used in making any investment decisions. This material is not a recommendation to buy, sell, implement, or change any securities or investment strategy, function, or process. Any financial and/or investment decision should be made only after considerable research, consideration, and involvement with an experienced professional engaged for the specific purpose. Public Trust Advisors is not a bank and your investment in Public Trust Advisors is not insured or guaranteed by the Federal Deposit Insurance Corporation or any other government agency. Past performance is no guarantee of future results. Any financial and/or investment decision may incur losses.

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Public Trust Advisors, LLC is an investment advisory firm based in Denver, Colorado that provides investment management services for the public sector. Our services include the management and administration of local government investment pools and separately managed accounts for individual local governments, creating strategies to better suit your needs!



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Sunday Welcome Reception Sponsors

Thank you to the state affiliate organizations that provided support for the Sunday Welcome Reception!

Indiana League of Municipal Clerks and Treasurers
Michigan Municipal Treasurers Association
Ohio Association of Public Treasurers
South Carolina Municipal Finance Officers, Clerks & Treasurers Association
Utah Association of Public Treasurers
Treasurers' Association of Virginia
Wyoming Association of Municipal Clerks & Treasurers



CONFERENCE PROGRAMMING



Monday, 10:00 am - 11:00 am • Ballroom CDE

Opening Keynote Address: Be Unstoppable!

Alex Weber

What would you do if you were UNSTOPPABLE? Who might you become? What could you achieve? As an American Ninja Warrior, award-winning host for NBC, acclaimed author, and US Lacrosse Coach of the Year, Alex has reached record-breaking achievements as a leader and peak performer. But with these accomplishments, he's also faced intense pressure, hard failures, and his own limitations. Alex will share his system of being UNSTOPPABLE so you can keep going, growing, and getting better. Learn methods to help you accomplish the goals that matter the most at work, in relationships, and in life!



Monday, 11:15 am - 12:30 pm • Ballroom CDE

Affordable Housing & the Role of the Treasurer's Office

Bryan Brown, Greenville Housing Fund; Ginny Stroud, United Bank; Patricia Dennis, City of Greenville; Racquel Collier, Caliber Real Estate

Greenville, South Carolina has found many partners willing to work together to solve their affordable housing shortage. This presentation will provide a toolbox of ideas and proven strategies to help you encourage and drive affordable housing development in your community, including identifying the need, useful partnerships between public and private organizations, and inventive funding ideas.



Monday, 1:30 pm - 2:30 pm

Concurrent Session (1 of 2) • Ballroom CDE

Market Myths & Treasury Truths

*Jason Click, CFP, Senior Vice President, Meeder Public Funds
Mike Kloack, Director, Advisory Services, Meeder Public Funds*

We will discuss “myths” and “truths” as they relate to managing fixed income operating funds and other funds such as ARPA and capital projects. Topics include market timing in all rate environments, optimal portfolio structures, strategies, and type of investments based upon your cash flow parameters and risk preferences. The session will also demonstrate why cash flow modeling helps achieve the objective of safety, liquidity, and a market rate of investment return.



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CONFERENCE PROGRAMMING



Monday, 1:30 pm - 2:30 pm • Concurrent Session (2 of 2) • Ballroom FGH

Where Have All the Workers Gone? A Unique Solution for Attracting & Retaining Public Sector Employees - *Joel J. Babbitt, NPPFA Benefits Group*

Municipalities and small government entities are facing staffing shortages with police, fire, public works, and office employees. The cost of healthcare in retirement is becoming more important to employees, but can be difficult to provide as a benefit. A Retirement Healthcare Funding Plan (RHFP) allows you to pay for those healthcare expenses completely tax free and can be used as a tool to help differentiate your district's compensation plan to help attract and retain employees. We'll explain how the RHFP works and help you determine if it's a good fit for your organization.



Monday, 2:45 pm - 4:45 pm • Ballroom CDE

How to Use Artificial Intelligence in Treasury & Finance

Anthony Moggio, Finance Director/Treasurer, City of Rochester, Michigan

A lot has been said about artificial intelligence (AI) and how it will impact our world. But AI is here now and you don't have to wait to get started. Learn how you can implement it to help your office become more effective and efficient. This session will provide a real-time demonstration on how to utilize AI models and a discussion on the types of treasury functions it can be used to accomplish, like cash forecasting, policy development, fraud detection, project support and more.



Tuesday, 9:30 am - 10:30 am • Ballroom CDE

Fraud in Local Government

Beth A. Wood, CPA, Director, Rural Government Service, Greg W. Isley CPA, PA

As North Carolina's State Auditor, our agency encountered many instances of fraud in our local governments, both large and small organizations. This session will discuss a number cases, how the fraud was carried out and what could have been done to prevent the fraud.



Tuesday, 10:45 am - 11:45 am

Concurrent Session (1 of 2) • Ballroom CDE

Liability Driven Investing (LDI) Solutions for Public Pensions

Mica Owens, Senior Vice President, Hilltop Securities

Hector Negroni, Founder & CEO, Foundation Credit

Learn how municipal bonds can increase returns, improve credit quality and diversify your portfolio.



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Visit The Exhibit Hall

Meet new vendors that could help you with your job AND make life easier! The 2024 Exhibit Hall is open during meals and is located on the mezzanine/upper level in Studio 220, where breakfast and lunch will be served.

- ✓ Meet Your Suppliers
- ✓ Find New Solutions
- ✓ Learn Ways to Save
- ✓ Take Ideas Back to Your Office



CONFERENCE PROGRAMMING



Tuesday, 10:45 am - 11:45 am • Concurrent Session (2 of 2) • Ballroom FGH

GASB: Just Doing It

Larry Finney, Greene Finney Cauley, LLP

It is a little quieter than usual at the moment, so we hope you enjoy the slower pace while it lasts. Let's not just talk about the newest GASBs and what they are working on, but what they do and how they do it. We are even going to have a moment of silence for a big anniversary.



Tuesday, 1:00 pm - 2:00 pm • Ballroom CDE

Unified Response: How Everyone Contributes to Emergency Management

Jessica Stumpf, Director of Emergency Management, Greenville County

Are you prepared for an emergency or disaster? We all have a role and responsibility in emergency management, both personally and professionally. This session will focus on what emergency management is, learning about potential hazards your community faces, building relationships, and planning considerations for treasurer's offices to maintain continuity of operations.



Tuesday, 2:15 pm - 3:15 pm • Concurrent Session (1 of 2) • Ballroom CDE

Recent Trends in Banking

Greg Prost, Robinson Capital Management

We will explore the reasons behind the recent failures and downgrades of banks which are grappling with a new technology landscape driven by the interconnectedness of their depositors and clients. We will also discuss current and upcoming issues to consider, highlighting the increased scrutiny on institutions with high exposure to commercial real estate loans, particularly in the office sector.



Tuesday, 2:15 pm - 3:15 pm • Concurrent Session (2 of 2) • Ballroom FGH

The Evolving Landscape of Fraud Protection: Latest Insights & Strategies

Sierre Lindgren, Fraud Prevention Manager, Paymerang

There were 493+ million ransomware attacks globally in 2022. In an era where cybercriminals lurk around every digital corner, protecting your business from payments fraud is paramount. This insightful presentation will expose the intricate web of deception used by fraudsters, including the menacing threats of Business Email Compromise (BEC) and Vendor Impersonation. Gain invaluable insights into the tactics employed by cybercriminals and discover battle-tested strategies to fortify your defenses. Challenge your assumptions, strengthen your security posture, and emerge empowered to defend your business against the shadows of cybercrime.

The Evolving Landscape of Fraud Prevention:

Latest Insights & Strategies



August 13, 2024
@2:15PM (ET)



Regency Ballroom



Sierre Lindgren
Fraud Prevention Manager



Michael Doerr
VP of Business Development

guidebook

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Or visit APTUSC.org/24cm for more info



CONFERENCE PROGRAMMING



Tuesday, 3:30 pm - 4:30 pm • Ballroom CDE

Economic Update

Charlie Dougherty, Director, Senior Economist, Wells Fargo Corporate and Investment Bank

Charlie will bring his analysis and expert views on the U.S. economy along with specialized insight into commercial real estate, housing, construction and regional sectors of the economy. Charlie regularly produces special commentary, writes indicator reports and contributes to the *Wells Fargo Weekly Economic & Financial Commentary*.



Wednesday, 9:30 am - 10:30 am • Ballroom CDE

Cyber Threats and Security

Cindy Starns, Special Agent, Federal Bureau of Investigation

This presentation will highlight the FBI's role in fighting cybercrime and provide an overview of the most prevalent cyber threats and their impact. Case studies and examples of social engineering showing how attacks happen will be presented to highlight the benefits of best practices. The presentation will also provide resources for learning more about common scams and cyber security.



Wednesday, 10:45 am - 12:30 pm • Ballroom CDE

Creating More Capacity and Creating Well-Being

Caleb Campbell, Closing Keynote Speaker

As we all face increased demands and fewer resources, instead of ever getting caught up, we just feel more tired. Caleb's mission is to help us unlock our courage by facing fears, embracing change, and staying authentic to make us stronger, even in our weakest moments. Far from offering clichéd "do better, be better" advice, Caleb skillfully guides his audience through discussions on courage, emotional intelligence, and heart-centered leadership. This presentation will provide a refreshing new perspective on leadership, guiding you to harness your own inner strength and redefine what it means to be a leader in today's world. You'll walk away with actionable tools and insights that empower you to lead with courage, purpose, and an open heart.



Wednesday, 1:00 pm - 6:00 pm • Arizona Room

ACPFIM - Advanced Certified Public Funds Investment Manager Training

Greg Prost, CIO, Robinson Capital Management

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. The ACPFIM training provides the confidence and knowledge to manage your investments more efficiently and effectively. *This program requires a written exam and is only open to CPFIM graduates.*

FINDING THE RIGHT PATH TAKES EXPERIENCE

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2023-24 Annual Report

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NETWORKING OPPORTUNITIES

Discover Greenville Walking Tour

The walking tour on Sunday morning will be a fantastic introduction to the downtown Greenville area. Walk along the Reedy River, over the pedestrian bridge, see all the shops, restaurants, and historic sights of this vibrant community, and then enjoy a delicious private luncheon at Fluor Field, the Greenville minor league baseball field. We'll meet in the lobby of the Hyatt Regency Hotel for the 10:00 a.m. start. You can walk back from Fluor Field or take the downtown trolley.



Sunday Evening Reception - The Avenue

Meet your fellow conference attendees at the official kick-off event of the conference at the Avenue, a beautiful rooftop venue with indoor and outdoor seating that has amazing views of the city. Relax with your favorite beverage and delicious hor d'oeuvres between 6:00 - 9:00 pm.



Monday Sponsor Reception

Immediately following the conclusion of Monday afternoon sessions, we'll move upstairs to the outdoor Roost restaurant and NOMA square to spend time with our sponsors and exhibitors. This event will have light snacks, a cash bar, and plenty of great conversation! Concludes at 6:00 pm to allow attendees to explore Greenville on their own Monday evening.



2024 CONFERENCE PLANNING COMMITTEE

Congratulations to this fantastic group from around the country for an incredible job in planning and implementing this year's Annual Conference.

Heather Gale, Utah - Committee Chair

Jody Anderson, Utah
 Susan Balls, Utah
 Vickie Barger, Ohio
 Amber Barnes, South Carolina
 Patricia Brown, South Carolina
 Amanda Childers, South Carolina
 Karen Coffman, Michigan
 Elizabeth Copeland, S. Carolina
 Chip Dawson, Utah
 Melissa DiGeronimom, Ohio
 William Hall, South Carolina
 Erika Hammond, South Carolina
 Shannon Harper, Utah
 Cristie Horton, South Carolina
 Jill Hunt, Utah
 Dawn Keiser, Michigan

Vicki Kitchen, Indiana
 Clint Lichtenwalter, Indiana
 Emily Lollis, Illinois
 Carrie Mugford, South Carolina
 Stephanie O'Cain, Indiana
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 Paula Payton, South Carolina
 Camilla Pitman, South Carolina
 Penny Robbins, Wyoming
 Judy Schiers, Utah
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Thank You!

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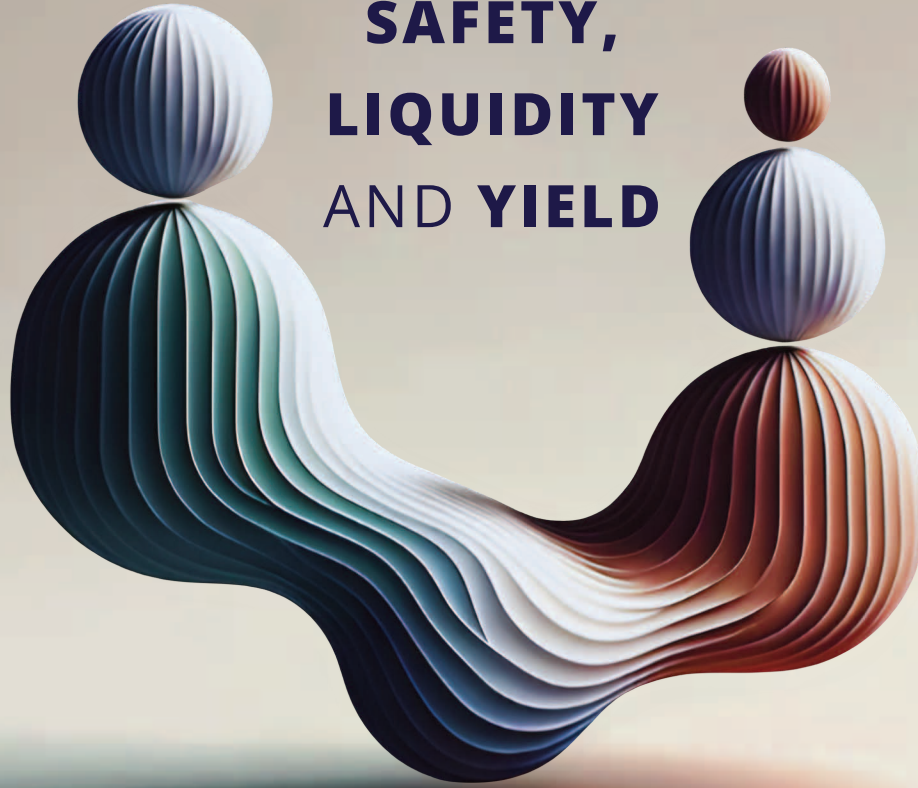
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Download Conference Materials

Presentations • Attendance Roster • Schedule • Speaker Biographies
Annual Meeting Packet • 2024-25 Board of Director Election Slate



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Save The Date



2025 APT US&C ANNUAL CONFERENCE
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