



# 2025 Annual APT US&C Point Tally Sheet

July 20-23 • Oak Brook, Illinois

Speaker/Topic	Description	Class Hours	CPFA Points	ACPFA Points	Points Earned
<b>Monday, July 21 9:00-10:30 am Game Changing Conversation Strategies</b>	Straight from the sidelines, veteran sports broadcaster Jen Mueller shares broadcast secrets and stories from the locker room that demonstrate less is more when it comes to effective communication. She'll provide conversation strategies that help you create buy-in, land your message, set up productive conversations and communicate effectively.	1.5	.75		
<b>Monday, July 21 10:45-11:45 am Economic Update</b>	Navigate today's complex economic landscape with insights from experts at Marquette Associates, investment consultant to the Illinois State Treasurer's Office, who will examine the implications of current economic volatility, evolving trade policies and tariffs, geopolitical conflicts, and employment trends on municipal investment portfolios. Our session will cut through market noise to provide clear analysis of how these macroeconomic forces directly impact local government treasury operations and investment strategies. Attendees will also discover comprehensive treasury management tools and investment solutions offered by the Illinois State Treasurer's Office, designed specifically to help municipalities safeguard and optimize their financial resources during uncertain times.	1.0	.5	1.0	
<b>CONCURRENT SESSION Monday, July 21 12:45-1:45 pm Contactless Payments</b>	City Treasurer John Globensky will share how Grand Rapids modernized resident services, making it easier to pay for things like taxes, water, and parking. He'll offer practical insights on what worked, what didn't, and how the city grew collections by 398% by implementing transformational changes.	1.0	.5		
<b>CONCURRENT SESSION Monday, July 21 12:45-1:45 pm Investment Policy Analysis</b>	A well-crafted investment policy may not grab headlines, but it's the backbone of responsible public fund investment management. While each state has its own rules, strong policies share common traits. In this session, we'll explore why every government entity should implement, maintain, and follow a clear investment policy, and how the best ones strike a balance between flexibility and control. We'll also walk through what it takes to achieve APT certification and why that recognition matters.				
<b>CONCURRENT SESSION Monday, July 21 2:00-3:00 pm Next Level Fraud Prevention Strategies for Today's Threat Landscape</b>	Gain invaluable insights into the tactics employed by cybercriminals and discover battle-tested strategies to fortify your defenses. Are you truly prepared to thwart the insidious schemes that could compromise your organization? Challenge your assumptions, strengthen your security posture, and emerge empowered to defend your business against the shadows of cybercrime.	1.00	.5	1.0	
<b>CONCURRENT SESSION Monday, July 21 2:00-3:00 pm Illinois Legislative Update</b>	Hear about the most recent updates to relevant State Laws affecting municipalities in Illinois.				



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<b>CONCURRENT SESSION</b> <b>Monday, July 21</b> <b>3:30-4:30 pm</b> <b>A Look Over the Hedge: Investment Practices</b>	Broaden your knowledge of investment practices, allocations, and local pool options across the country. You invest public funds on behalf of your municipality in your state 'USA', satisfy your curiosity of how a sampling of other states and local governments invest in states that are not your own. How does your state pool compare to other state pools? What kind of investment allocations do other counties or cities employ that are not in your state?	1.0	.5	1.0	
<b>CONCURRENT SESSION</b> <b>Monday, July 21</b> <b>3:30-4:30 pm</b> <b>Insights from the Field: Uncovering Trends in Fraud Schemes</b>	It's not a matter of "if" but "when" you or your organization will be affected by fraud. Join us for this informative discussion to explore a municipal fraud case study and explore: <ul style="list-style-type: none"> <li>• The latest fraud threats and tactics</li> <li>• Efforts to combat fraud</li> <li>• How financial crimes are investigated</li> </ul>			1.0	
<b>Tuesday, July 22</b> <b>9:00-10:30 am</b> <b>Laughter is Medicine</b>	"Laughter is Medicine" presentation will leave you filled with laughter! This interactive session highlights the transformative power of laughter, emphasizing how it boosts productivity, relieves stress, and enhances mental and physical well-being. We all tend to carry stress in our jobs and personal lives, and it's good to be reminded to take a break and have a good laugh!	1.5	.75		
<b>CONCURRENT SESSION</b> <b>Tuesday, July 22</b> <b>10:45-11:45 am</b> <b>Safeguard Public Funds</b>	This session will provide a detailed review and classify authorized investment vehicles (e.g., U.S. Treasuries, municipal bonds, certificates of deposit) understanding the characteristics, risks, and returns of each type. It will also help attendees understand the importance of capital preservation and risk management. Attendees will gain a deeper understanding of the who, what, where, when, why and how of investing for municipal entities.	1.0	.5		
<b>CONCURRENT SESSION</b> <b>Tuesday, July 22</b> <b>10:45-11:45 am</b> <b>Leveraging a 115 Trust: Funding Tax-Free Retiree Healthcare</b>	Attendees will hear in-depth details on how the 115 Trust is a unique solution that aligns benefits and compensation for municipal employees and can be used to pay for retirement healthcare expenses including insurance premiums.			1.0	
<b>Tuesday, July 22</b> <b>1:00-2:00 pm</b> <b>Resilience by Design: Public Funds Portfolio Strategies</b>	This session provides a comprehensive roadmap for public fund managers to build portfolios that are not only compliant and secure but also agile enough to perform through economic highs and lows. We'll explore how to integrate detailed cash flow forecasting into your investment process to enhance liquidity management and reduce reinvestment risk. The presentation will also cover strategic asset allocation and portfolio construction techniques tailored to public sector objectives—ensuring your portfolio is built to endure and adapt across all market environments.	1.0	.5	1.0	



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<b>CONCURRENT SESSION</b> <b>Tuesday, July 22</b> <b>2:15-3:15 pm</b> <b>From Hype to Help:</b> <b>Practical AI Applications</b>	This session demystifies artificial intelligence by focusing on practical, real-world applications that local governments can implement today. Aimed at finance and operations leaders, it highlights ways AI is already being used to drive efficiency, reduce manual workload, and improve public service. Without requiring technical expertise, the session guides attendees through use cases, implementation strategies, ethical considerations, and how to build a successful AI pilot program tailored to municipal operations.	1.0	.5	1.0	
<b>CONCURRENT SESSION</b> <b>Tuesday, July 22</b> <b>2:15-3:15 pm</b> <b>An In Depth Look at OPEB</b>	What are some of the typical differences in OPEB from state to state? What are common differences between Pensions and OPEB, and how might that affect prefunding? Why are many OPEB plans pay as you go and many others overfunded? What are some potential hazards and suggestions regarding prefunding? How are OPEB data and cybersecurity risks often different from Pension or General Fund moneys?				
<b>Tuesday, July 22</b> <b>3:30-4:30 pm</b> <b>Courageous Leadership</b>	During this powerful presentation Dan shares his incredible story and the important lessons that he learned during his long road to recovery about leadership and about life.	1.0	.5		
<b>Wednesday, July 23</b> <b>9:00-10:15 am</b> <b>Retention, Succession and Planning</b>	Retention, recruitment, and succession planning are critical to maintaining a strong and effective municipal government workforce. In this session, you will learn about the importance of fostering a positive work environment, offering competitive benefits, and investing in professional development to attract top talent, retain experienced staff, and ensure continuity through thoughtful succession strategies.	1.25	.625		
<b>Wednesday, July 23</b> <b>10:30-11:45 am</b> <b>Leading in Crisis and Managing a Resilient Community</b>	City Manager Neukirch will present an overview of Highland Park's emergency response following a mass shooting at their Independence Day parade in 2022, plus the City's on-going resiliency efforts to serve the community.	1.75	.875	1.75	
<b>TOTAL EARNED</b>					