

ADVANCED Certified Public Funds Investment Manager Training

**Wednesday, August 16, 2023
In-Person & Online**

What You'll Learn

The ACPFIM is designed to enhance your understanding and build on the foundation of the CPFIM class. 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 class includes a written test.

Graduates will receive a certificate upon completion and will be mailed a plaque recognizing their accomplishment. Having a current CPFIM is a prerequisite for this training.



Analysis

- Quantifying Your Investment Policy Objective
- Understanding the Risks, Liquidity, and Yield
- Defining Risk in Your Investment Portfolio
- Liquidity Analysis
- Yield Analysis

Investment Strategy

- Understanding the Difference Between Policy and Strategy
- Common Strategies
- Developing and Implementing a Plan
- Dealing with Obstacles of Chance
- Investment Management Process
- Active and Passive Investment Strategies
- Interest Rate Forecasting and Bench Marking

"Greg is the perfect instructor. Thank you for the opportunity to learn from him!"

Attend In Person or Online

This training will be offered in-person and as a livestreamed event on Wednesday, August 16 from 3:00 - 8:00 pm ET.

Training cost is \$299 for APT US&C members and \$499 for non-members.

In-Person: the class will be held at the Little America hotel Conference Center following the conclusion of the APT US&C Annual Conference.

Online attendees: you will receive a Zoom meeting link to attend the livestreamed session. Online attendees can comment and ask questions directly or via the chat. Local start time is 1:00 pm (Mountain Time), which is 3:00 pm Eastern, 2:00 pm Central, and Noon Pacific.

Instructor



Greg Prost is a knowledgeable and entertaining speaker who presents to MMTA, MGFOA, MACT, and APT US&C. Since becoming APT US&C's CPFIM/ACPFIM instructor in 2018, Greg has received rave reviews. He is the Chief Investment Officer of the Traditional Fixed Income Group at Robinson Capital. He has over 30 years of experience investing in the bond market and oversees the core fixed income operation, including directing fixed income strategy and managing institutional portfolios. Greg holds an MBA from Western Michigan University, as well as a BA in Economics from Kalamazoo College. Greg is a CFA Charterholder and member of the CFA Society of Detroit.

Register at www.APTUSC.org