



Association of Public Treasurers of the United States and Canada

Certified Public Finance Administrator (CPFA) New Applicant Information

The CPFA designation means that an individual is committed to education and experience. This prestigious designation is administrated by the Association of Public Treasurers of the United States and Canada (APT US&C): applicants must fulfill the following requirements, submit an application online, upload any required supporting documentation, and pay their application fee.

The CPFA accreditation expires after five years; the CPFA may be maintained by continuing education and job duties per the CPFA recertification policy and form; an Advanced CPFA designation is also available. Please visit www.APTUSC.org for more information on recertification and the Advanced accreditation.

Each new applicant for CPFA certification must:

1. Be a duly elected or appointed treasurer, deputy or assistant treasurer, employee in/or dealing with the office of treasurer, or other principal officer in the public entity who is charged with the performance or supervision of one or more of the following responsibilities: investments, debt, or treasury activities.
2. Be an Active Member (see APT US&C's Bylaws for definition):
 - a. For at least twenty-four months immediately before applying for certification; and
 - b. At the time of approval.
3. Believe in and practice APT US&C's Code of Ethics (as adopted).
4. Demonstrate a combined total of 100 experience and education points per the chart on the following page. A minimum of 40 points must be earned in either education or experience with a maximum of 60 points in the remaining category. Certification expires every five years and must be renewed prior to expiration.
5. Submit a non-refundable fee of two hundred dollars (\$200). The application fee will be waived for the second submission if the first attempt at certification is unsuccessful. The fee includes application processing and certification plaque.

The application deadline is June 1st and CPFA designations are formally announced at the APT US&C Annual Conference.

Note: a candidate whose application is not approved by the CPFA Certification Committee will be notified of the Committee's decision and the steps needed to receive the credential. Should the candidate disagree with the Committee's ruling and recommendation on how to earn the necessary points for certification, the candidate may appeal the Committee's decision. The appeal must be sent in writing to APT US&C's headquarters within thirty (30) days of notification of the Committee's decision. The Committee Chair, within thirty (30) days, shall reconsider the circumstances and reverse the decision or submit the appeal to the Board of Directors for final determination.



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Experience Standards

	Points	Maximum Allowed
Work Experience: (within the past 15 years for a maximum of 40 points, no duplicate credit for dual positions)		
• Experience as a public treasurer as defined on the New Applicant Information sheet	4 per year	40
• Administrative, supervisory or managerial experience in government before treasury work	2 per year	20
• Administrative, supervisory or managerial experience before treasury work	1 per year	10
Total Work Experience		40
Other Experience		
• Attendance at an annual conference of APT US&C	5 per year	30
• Attendance at a state/province APT association conference*	2 per year	12
• Service as a committee member for APT US&C or a state/province APT association*	1 per year	5
• Service as a committee chair for APT US&C or a state/province APT association*	2 per year	10
• Service as a director or parliamentarian of APT US&C or a state/province APT association*	3 per year	15
• Service as an officer of APT US&C or a state/province APT association*	4 per year	20
• Service as a mentor in the APT US&C Mentor Program	1 per year	5
• Earn the APT US&C Certified Public Funds Investment Manager certification	2	7
• Earn the APT US&C Advanced Certified Public Funds Investment Manager certification	3	
• Complete a recognized national professional achievement certification program related to treasury management (e.g., CCM, CGFM, CPA, CPFO, CFE, CIA, CMA)	5 per certification	20
• Recipient of a special award presented by APT US&C or a state/province APT association*	5 per award	15
* Applicants from states/provinces that do not have an APT state/province association may substitute points from ONE statewide or province-wide organization relating to treasury management.		

Education Standards

	Maximum Allowed
• Bachelor degree in public administration, accounting, finance or related field OR completion with a C grade or better of college or university courses related to treasury management (1 point per semester hour; 2/3 of a point per quarter hour)	50
• Associate degree in public administration, accounting, finance, or related field	35
• Bachelor degree in an unrelated field	15
• Masters or Doctoral degree (5 points each)	10
• Completion of an APT US&C public treasurers institute (up to 50 points) AND/OR attendance at education programs pre-approved by APT US&C (assignment of points based on review of program agendas by the CPFA Certification Committee)	60
• Treasury-related education by non-APT statewide or province-wide organizations (1 point per 4 hours of instruction)	10

CPFA applicants must demonstrate a minimum of 40 points up to a maximum of 60 points in both the experience and education categories. A total of 100 points is required between both categories.



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COMMITTEE MEMBER/CHAIR OR DIRECTOR/OFFICER: Include proof of service.

Year _____ Position _____ Total Points _____

Association _____

Year _____ Position _____

Association _____

Year _____ Position _____

Association _____

Year _____ Position _____

Association _____

APT US&C AWARD OR STATE/PROVINCE AWARD: Include proof of award.

Year _____ Award Name _____ Total Points _____

Awarding Association & Conference Site _____

CPFIM/ADVANCED CPFIM: Include proof of accreditation.

Year _____ Level _____ Total Points _____

Training Site _____

Year _____ Level _____

Training Site _____

NATIONAL CERTIFICATION PROGRAM: Include proof of certification.

Certification Name _____ Total Points _____

Date _____ Organization _____

Total Experience Points (minimum of 40, maximum of 60) _____

Education

ASSOCIATE, BACHELOR, MASTER'S OR DOCTORAL DEGREE: Include transcript.

Degree _____ Major _____ Total Points _____

College/University _____

Location _____ Date Received _____



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COLLEGE/UNIVERSITY COURSES RELATED TO TREASURY MANAGEMENT: Include transcript.

Course Name/Number _____ Total Points _____

College/University _____

Grade _____ Location _____

Credit Hours _____ Date Completed _____

Course Name/Number _____

College/University _____

Grade _____ Location _____

Credit Hours _____ Date Completed _____

PUBLIC TREASURER INSTITUTE OR OTHER EDUCATIONAL PROGRAMS: Include proof of completion.

Sponsored By _____ Total Points _____

Conducted By _____

Course Dates _____ Date of Completion _____

Course Dates _____ Date of Completion _____

Course Dates _____ Date of Completion _____

Course Dates _____ Date of Completion _____

Total Education Points (minimum of 40, maximum of 60) _____

Summary

Total Experience Points (minimum of 40, maximum of 60) _____

Total Education Points (minimum of 40, maximum of 60) _____

Total Certification Points (minimum of 100) _____



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Job Verification Form

Name _____

Organization _____

Title _____

Dates of Employment _____ to _____

Duties: *If not treasury; must be administrative, supervisory or managerial; check all that apply.*

Investment of entity cash

Cash flow forecasting

Billing and collection of special assessments

Collection of receivables

Supervisor/manager

Tax collection

Banking relationship

Bond payments

Bond activity

Other (specify) _____

Signature of applicant

Date

Signature of Mayor, Manager, or Supervisor

Date

Signature of Clerk (if elected)

Date