



Association of Public Treasurers of the United States and Canada

Certified Public Finance Administrator (CPFA) Recertification 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): the certification expires every five years. To maintain certification, applicants must fulfill the following requirements, submit an application online, upload any required supporting documentation, and pay the application fee.

An Advanced CPFA designation is also available. Please visit www.APTUSC.org if you are a first time CPFA applicant or for more information on the Advanced accreditation.

Applicant for CPFA re-certification must:

1. In each of the five years since last certified, have been the:
 - 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.
 - b. Employee of an institution or organization whose operations are closely allied with or related to the functions of a treasurer's office.
2. Have maintained continuous Active or Associate membership (see APT US&C's Bylaws for definition):
 - a. For every five years since certification, and
 - b. At the time of approval.
3. Believe in and practice APT US&C's Code of Ethics (as adopted).
4. Demonstrate 50 points in any combination of experience and education points since the last certification.
5. Submit a non-refundable fee of \$125. The application fee will be waived for the second submission if the first attempt at certification is unsuccessful. The fee includes application processing and dated bar to add to original certification plaque. To receive a new certification plaque, applicant must include an additional \$75 with application. Applications received after June 1 will incur a \$25 late fee.

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

<i>All points must be earned since last certification</i>	Points	Maximum Allowed
Work Experience: <i>(for the five years since last certification)</i>		
• Experience as a public treasurer as defined on the Re-certification Information sheet	4 per year	20
Other Experience		
• Complete a recognized national professional achievement certification program related to treasury management (e.g., CCM, CGFM, CPA, CPFO, CMA)	5 per certification	20
• Attendance at an annual conference of APT US&C	5 per year	25
• Attendance at a state/province APT association conference*	2 per year	10
• Service as a committee member for APT US&C or a state/province APT association*	1 per year per committee	5
• Service as a committee chair for APT US&C or a state/province APT association*	2 per year per committee	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	5	7
• Recipient of a special award presented by APT US&C or a state/province APT association*	5 per award	10
* 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

<i>All points must be earned since last certification</i>	Maximum Allowed
• Bachelor degree in public administration, accounting, finance or related field.	50
• 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)	25
• 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 approved Advanced Institute (up to 30 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)	40
• Treasury-related education by non-APT statewide or province-wide organizations (1 point per 4 hours of instruction)	5

CPFA applicants for re-certification/maintenance of their CPFA must demonstrate a minimum of 50 total points between both categories.



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Experience & Education Form

Fill out this form to upload with your application, along with documentation as specified.
Include additional information as necessary.

Experience

PRESENT POSITION: Submit certification of election or letter verifying election or appointment to office, including dates of service, to earn points. An APT US&C Job Verification Form may be used.

Position _____ Dates Employed _____

Employer _____ Total Years ____ @ ____/year = Total Points _____

Responsibilities/Job Description _____

OTHER POSITION(S) HELD IN THE LAST FIVE YEARS, IF APPLICABLE: Submit certification of election or letter verifying election or appointment to office, including dates of service, to earn points. An APT US&C Job Verification Form may be used. Include additional information as necessary.

Position _____ Dates Employed _____

Employer _____ Total Years ____ @ ____/year = Points _____

Responsibilities/Job Description _____

Position _____ Dates Employed _____

Employer _____ Total Years ____ @ ____/year = Points _____

Responsibilities/Job Description _____

APT US&C ANNUAL CONFERENCE OR STATE/PROVINCE CONFERENCE: Include proof of attendance.

Year _____ Conference Site _____ Total Points _____

Year _____ Conference Site _____

Year _____ Conference Site _____

Year _____ Conference Site _____

Year _____ Conference Site _____

Year _____ Conference Site _____

Year _____ Conference Site _____

Year _____ Conference Site _____

Year _____ Conference Site _____

Year _____ Conference Site _____



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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) _____

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 _____

Summary

Total Experience Points _____

Total Education Points _____

Total Certification Points (minimum of 50) _____



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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