



Association of Public Treasurers of the United States and Canada

Advanced Certified Public Finance Administrator (ACPFA) Re-Certification Application

The Advanced CPFA is designed to encourage and reward advanced education as well as participation in the APT US&C and its state and province associations to help strengthen our entire treasury community.

Applicant for ACPFA 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 finance 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 membership in APT US&C (see APT US&C's Bylaws for definition):
 - a. Every year since last certification; and
 - b. At the time of approval.
3. Believe in and practice APT US&C's Code of Ethics.
4. Demonstrate 30 points in any combination of experience and advanced education points since the last certification. All points must be earned since the last ACPFA certification; all documentation must be submitted with the application.
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 certification award.

The ACPFA accreditation expires after five years. To receive recognition at the APT US&C Annual Conference, the application deadline is June 1; however, applications are accepted any time throughout the year.

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 info@aptusc.org 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. If final determination is that the application is not approved, the applicant will be given one-year to re-submit without an additional application fee, to earn the required points for reconsideration.



Association of Public Treasurers of the United States and Canada

Experience Points

All points must be earned since last ACPFA certification	Points Earned
Attendance at an APT US&C Annual Conference	5 per year
Attendance at an APT US&C Annual Affiliate association conference* (determined as where the annual election/membership meeting is held)	2 per year
Serve as a committee member for APT US&C or an Affiliate Association Association*	1 per year per committee
Serve as a committee chair for APT US&C or an Affiliate Association*	2 per year per committee
Serve as a director or parliamentarian of APT US&C or an Affiliate Association*	3 per year
Serve as an officer of APT US&C or an Affiliate association*	4 per year
Serve as a mentor in an APT US&C Affiliate Mentor Program.	1 per year
Complete a recognized national professional achievement certification program related to treasury management (e.g., CPFIM, ACPFIM, CCM, CGFM, CPA, CPFO, CMA)	5 per certification
Recipient of an individual service award presented by APT US&C or an Affiliate Association*	5 per award
* Applicants from states/provinces that do not have an APT Affiliate Association may substitute points from ONE statewide or province-wide organization relating to treasury management.	

Education Points

All points must be earned since last ACPFA certification	Points Earned
Masters or Doctoral degree	40
Bachelor degree in public administration, accounting, finance or related field	25
Associate degree in public administration, accounting, finance, or related field	15
Bachelor degree in an unrelated field	15
Completion with a C grade or better of college or university courses related to treasury management (one point per semester hour)	25
Attend an APT US&C approved Advanced Education Program (approval and points contingent on review of program agendas by the CPFA certification chair/committee.	1 point per hour of instruction
Take the APT US&C Advanced CPFIM Certification	5
Present at an APT US&C conference, a state/province affiliate association or other educational sessions, including virtual trainings, sponsored by APT US&C or affiliate association.	2 points per hour of instruction
Write an APT US&C training manual	25 points per manual
Assist with revisions/re-writes of APT US&C training manuals	10 points per manual
Write and publish an article related to treasury management for the APT US&C or affiliate association newsletter/website <ul style="list-style-type: none"> • Under 500 words (1 point) • 501 to 1000 words (2 points) • 1001 to 1500 words (3 points) • Over 1501 words (4 points) 	1-4 points per article

Demonstrate 30 points in any combination of experience and advanced education points since the last certification. All points must be earned since the last ACPFA certification; all documentation must be submitted with the application.



Association of Public Treasurers
of the United States and Canada

Advanced Certified Public Finance Administrator (ACPFA) Re-Certification Application

Fill out this form to upload with your application, along with documentation as specified.

Name _____ Entity _____

Experience

Attendance at APT US&C **Annual Conference** (4 pts per year) or Affiliate **Annual Conference** (2 pts per year).
Include proof of attendance.

Year _____	Host _____	Training _____	Points _____
Year _____	Host _____	Training _____	Points _____
Year _____	Host _____	Training _____	Points _____
Year _____	Host _____	Training _____	Points _____

Total Attendance Points: _____

Service as **Committee Member** (1 pt per year), **Committee Chair** (2 pts per year), **Board Director** (3 pts per year),
Board Officer (4 pts per year); **Mentor** (1 pt per year). Include proof of service.

Year _____	Association _____	Position _____	Points _____
Year _____	Association _____	Position _____	Points _____
Year _____	Association _____	Position _____	Points _____

Total Service Points: _____

APT US&C or other National **Professional Certification** related to treasury management (e.g., CPFIM, ACPFIM, CCM,
CGFM, CPA, CPGO, CFE, CIA, CMA) (5 pts for initial; 3 pts for re-certification). Include proof of accreditation.

Certification _____	Sponsor _____	Year Earned _____
Certification _____	Sponsor _____	Year Earned _____

Total Certification Points: _____

APT US&C or Affiliate Association **Special Award Recognition** (5 pts per award). Include proof of award.

Year _____	Association _____	Award _____
Year _____	Association _____	Award _____

Total Award Recipient Points: _____

TOTAL EXPERIENCE POINTS _____



Association of Public Treasurers of the United States and Canada

EDUCATION

Associate, Bachelor, Master's or Doctoral Degree. Include all transcripts.

Degree _____ Major _____ Date Received _____

College/University _____ Location _____

Total Degree Points: _____

College/University Treasury Management Courses. Include all transcripts.

Course Name/Number _____ Grade _____ Credit Hours _____

Date Completed _____ College/University _____ Location _____

Course Name/Number _____ Grade _____ Credit Hours _____

Date Completed _____ College/University _____ Location _____

Total Treasury Management Courses Points: _____

APT US&C or Affiliate **"advanced"** training programs (in person or virtual). Include proof of attendance and hours of attendance and training program descriptions. (1 point for every hour of education; or non-APT/Affiliate: 1 point for every 2 hours of education)

Training _____ Host _____

Training Date(s): _____ Location _____ Points _____

Training _____ Host _____

Training Date(s): _____ Location _____ Points _____

Training _____ Host _____

Training Date(s): _____ Location _____ Points _____

Training _____ Host _____

Training Date(s): _____ Location _____ Points _____

Training _____ Host _____

Training Date(s): _____ Location _____ Points _____

Total Training Points: _____



Association of Public Treasurers
of the United States and Canada

APT US&C Advanced CPFIM Certification or Re-Certification. Include proof of certification.

Certification _____ Location _____ Year Earned _____

Total Certification Points: _____

Manual or Article: Include proof of publication.

Title of Article and Publication _____

Sponsor Organization _____

Date of Publication _____ Number of Words in Article _____

Title of Article and Publication _____

Sponsor Organization _____

Date of Publication _____ Number of Words in Article _____

Total Manual/Article Points: _____

Presenting at a Conference or other education training. Include proof of presentation.

Title/Topic of Presentation _____

Sponsor Organization _____

Date of Presentation _____ Length of Presentation _____

Title/Topic of Presentation _____

Sponsor Organization _____

Date of Presentation _____ Length of Presentation _____

Total Presentation Points: _____

TOTAL EDUCATION POINTS _____

Summary

Total Experience Points _____

Total Education Points _____

TOTAL POINTS _____