



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 administered 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. Every year since last 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 certification award. To receive a new certification plaque, applicant must include an additional \$75 with application.

The application deadline is June 1st and CPFA designations are formally recognized 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 Points

<i>All points must be earned since last CPFA certification</i>	Points	Maximum Allowed
Work Experience		
Experience as a public treasurer as defined on the Re-certification Information sheet	4 per year	20
Other Experience		
Earn a recognized national professional achievement certification program related to treasury management (e.g., CPFIM, ACPFIM, CCM, CGFM, CPA, CPFO, CMA)	5 per certification	20
Attendance at an annual APT US&C Conference	5 per year	25
Attendance at an annual APT US&C state/province affiliate association conference*	2 per year	10
Service as a committee member for APT US&C or an APT US&C state/province affiliate association*	1 per year per committee	5
Service as a committee chair for APT US&C or an APT US&C state/province affiliate association*	2 per year per committee	10
Service as a director or parliamentarian of APT US&C or an APT US&C state/province affiliate association*	3 per year	15
Service as an officer of APT US&C or an APT US&C state/province affiliate association*	4 per year	20
Recipient of an individual service award presented by APT US&C or an APT US&C state/province affiliate association*	5 per award	10
<i>*Applicants from states/provinces that do not have an APT US&C state/province association may substitute points from ONE statewide or province-wide organization relating to treasury management.</i>		

Education Points

<i>All points must be earned since last CPFA certification</i>	Maximum Allowed
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
Completion of an APT US&C Institute AND/OR attendance at education programs pre-approved by APT US&C (assignment of points based on review of program agendas by the CPFA Committee Chair)	40
Treasury-related education by non-APT US&C affiliate state or province associations, or national organizations (such as GFOA, etc.) (one point per 4 hours of instruction)	5
Take the APT US&C Certified Public Funds Investment Manager (CPFIM) certification training	3
Take the APT US&C Advanced CPFIM (APCFIM) certification training	5



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CPFA Recertification Experience & Education Form

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

WORK 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 _____ Employer _____

Dates Employed: From _____ To _____ Total Years _____

Responsibilities/Job Description (or attach job description) _____

OTHER POSITION(S) HELD IN THE LAST FIVE YEARS, IF APPLICABLE:

Position _____ Employer _____

Dates Employed: From _____ To _____ Total Years _____

Responsibilities/Job Description (or attach job description) _____

WORK EXPERIENCE POINTS: _____

OTHER EXPERIENCE

APT US&C OR OTHER NATIONAL PROFESSIONAL ACHIEVEMENT CERTIFICATION RELATED TO TREASURY MANAGEMENT (e.g., CPFIM, ACPFIM, CCM, CGFM, CPA, CPGO, CFE, CIA, CMA): Include proof.

Certification _____ Location _____ Year Earned _____

Certification _____ Location _____ Year Earned _____

Certification _____ Location _____ Year Earned _____

Total Certification Points: _____

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

Year _____ Host Name _____ Location _____

Year _____ Host Name _____ Location _____

Year _____ Host Name _____ Location _____

Total Conference Attendance Points: _____



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

Year _____ Association _____ Position _____

Year _____ Association _____ Position _____

Year _____ Association _____ Position _____

Year _____ Association _____ Position _____

Year _____ Association _____ Position _____

Total Participation Points: _____

APT US&C OR STATE/PROVINCE AFFILIATE ASSOCIATION SPECIAL RECOGNITION AWARD: Include proof of award.

Year _____ Association _____ Award _____

Year _____ Association _____ Award _____

Total Award Recipient Points: _____

OTHER EXPERIENCE POINTS: _____

TOTAL EXPERIENCE POINTS: _____

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: _____



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APT US&C STATE AFFILIATE ADVANCED INSTITUTE TRAINING OR OTHER APT US&C STATE AFFILIATE EDUCATIONAL PROGRAMS: Include proof of completion and training program agenda or point tally sheets.

Name of Institute _____ Affiliate Association _____

Institute Dates: From _____ To _____ Location _____ Points Awarded _____

Name of Program/Event _____ Affiliate Association _____

Program Date(s): From _____ To _____ Location _____ Points Awarded _____

Name of Program/Event _____ Affiliate Association _____

Program Date(s): From _____ To _____ Location _____ Points Awarded _____

Name of Program/Event _____ Affiliate Association _____

Program Date(s): From _____ To _____ Location _____ Points Awarded _____

Total Institute/Education Program Points: _____

TOTAL EDUCATION POINTS: _____

Summary

Total Experience Points: _____

Total Education Points: _____

TOTAL POINTS: _____ (50 minimum points needed)