



2024 ADVANCED INSTITUTE

May 8-10 • Double Tree Riverfront • Bay City

The Road to
Your Success

MiCPT/CPFA POINT TALLY SHEET

MiCPT - Michigan Certified Professional Treasurer • CPFA - Certified Public Finance Administrator

Use this sheet to keep track of education points earned at the 2023 Advanced Institute.

There are a possible 10.0 MiCPT points / 10.0 CPFA points / 8.25 ACPFA.

Instruction Time	Topic	Speaker/Description	MiCPT Points	CPFA Points	ACPFA Points
Wednesday, May 8					
1.25 Hours 8:15-9:30 am	Less Burnout and Stress = Greater Success! Sherene McHenry, Keynote Speaker	In today's fast-paced, ever-changing world and workplace, individuals are increasingly frazzled, frustrated and fearful. Burnout is on the rise. Whether you are stressed out, burned out or thinking of tapping out, this presentation will take a deeper dive to provide the tools leaders need to operate from a position of strength and guide those they lead and serve to do the same.	.625	.625	1.25
2 Hours 9:45-11:45 am	Applications for Using Chat GPT/AI in Treasury Anthony Moggio, Finance Dir., Treasurer, City of Rochester	AI models can be used for various treasury functions such as cash forecasting, policy development, fraud detection, project support and more. This presentation will walk you through live interactive demonstrations on how to use AI in your office.	1.0	1.0	2.0
1.5 Hours 12:30-2:00 pm	Qualifying Statements, Deficit Elimination Plans and Security Reports Tom Colis, Miller Canfield	Learn the latest and important information you need to know about Qualifying Statements, Deficit Elimination Plans and Security Reports	.75	.75	1.5
1.5 hours 2:15-3:45 pm	Managing Special Captures Jim Mills, State of MI, Bret Padgett, Comstock Charter Twp. and Mike Pettigrew, City of Ann Arbor	Does your municipality have a special capture district or is it planning to have one? From setting up your database, to tracking your capture, to completing your reports, capturing taxes can get complicated. In this session, you will learn about some types of special capture districts and hear some practical techniques to set yourself up for success.	.75	.75	1.5
1 hour 4:00-5:00 pm	Economic/Market Outlook John Augustine Chief Investment Officer/ Economic Strategist, Huntington Bank	With over 30-years' experience as an Investment and Economic Strategist, John will share important updates on market review, current economic stance, the state and regional economy and call to actions.	.5	.5	1.0
Breaks/Lunch/ Dinner Networking	Peer Networking	Take advantage of the support and insight from your peers on issues facing your office by networking during breaks and meals.	.75	.75	

Thursday, May 9					
Instruction Time	Topic	Speaker/Description	MiCPT Points	CPFA Points	ACPFA Points
1.5 hours 8:30-10:00 am	Assessment to Tax – Treasurer/Assessor Collaboration Laurie Sheldon, Treasurer and Andy Johnson, Assessor City of Kentwood	Municipal assessors and treasurers play distinct but interconnected roles in local government finance. This session will discuss the importance of a successful collaboration regarding roll over processes, Board of Review, EMPP, Splits, Special Captures, small claims court and more.	.75	.75	
2.0 Hours 10:15-12:15 pm	Managing Employee Expectations Post Pandemic Jody Weissler-DeFoe, Deputy Treasurer, Joseph Rozell, Director of Elections and Dan Klemptner, Chief of Employee and Labor Relations – Oakland County	This session will discuss workplace expectations from the employee and management perspective considering the changes from pre-pandemic standards to post pandemic expectations. Think about your challenges, complaints and frustrations between employees or managers and bring your questions. This session will end with a practical exercise to open your mind to consider the other side of the negotiating table.	1.0	1.0	
1 Hours 1:00-2:00 pm	Business Email Compromise, Wire Fraud & Other Fraud Trends Joshua Seeney, Agent United States Secret Service	The United States Secret Service will be covering emerging fraud tactics and trends in business email compromise, associated wire fraud as well as emerging fraud by digital impersonation and deception.	.5	.5	1.0
2 Hours 2:15-4:15 pm	The Art of Customer Service and De-escalation Sara Eklove and Jessi Zielinski, AllOne Health	Customer Service and De-escalation often go hand in hand. Identify ways to provide the best customer service while managing challenging individuals and situations.	1.0	1.0	
Breaks/Lunch/ Dinner Networking	Peer Networking	Take advantage of the support and insight from your peers on issues facing your office by networking during breaks and meals.	.625	.625	
Friday, May 10					
2 hours 8:15-10:15 am	Legislative Update Judy Allen, MTA and Dave Hodkins, MML	Attendees will hear the updates on what is happening with Michigan legislation and its impact on municipalities and treasury offices.	1.0	1.0	
1.5 hours 10:30-Noon	Jeopardy!	This fun interactive networking session will test attendees' knowledge on the principles of taxation.	.75	.75	