



2023 Winter Workshop

January 19-20 – Hilton Garden Inn West, Lansing

Point Tally Sheet

CPFA - Certified Public Finance Administrator; ACPFA – Advanced Certified Public Finance Administrator; MiCPT - Michigan Certified Professional Treasurer

Use this sheet to keep track of education points earned at the 2023 Winter Workshop.
There are a possible 5.13 CPFA points, 3.5 ACPFA points and 5.13 MiCPT points.

Instruction Time	Topic	Speaker	CPFA Points	ACPFA Points	MiCPT Points
Thurs., Jan 19 1:00-3:00 pm	Treasury in a Year: Important Dates and Projects Learn the "must-haves" for every treasurer throughout the year so you'll know what has to be done and when. Each municipality type will be represented by your peers, including the interactions and information flow at the county level.	Tricia Wiggle-Bazzy, Dep. Treasurer, Hamburg Township Rande Listerman, Clerk-Treasurer, Village of Pentwater Stacy Paige, Treasurer City of Romulus Ann Mahaffey, Deputy Treasurer Midland County	1.0		1.0
Thurs., Jan 19 3:15-5:00 pm	Customer Service: Dealing with the Angry Public In this session, attendees will learn how to set the tone for a positive customer experience, understand barriers to good communication, and how to defuse anger of unique and dissatisfied customers.	Alyssa Koopman, Clinician Encompass – All in One Health Co.	.88	0	.88
Fri., Jan 20 8:30-9:30 am	How to Connect with New Legislators As a former state Senator, Pete will share why and how to best connect with state legislators.	Peter MacGregor, Treasurer Kent County	.5	0	.5
Fri., Jan 20 9:45-11:45 am	Required and Highly Recommended Policies The panel will discuss the importance of policies – those required by federal and state law, recommended policies to support treasury office functions, and will provide sample policies for reference.	Rose Dillon, Treasurer, Fruitport Township Mary Ann Kornexl, Finance Director, City of Mt. Pleasant Phil Longoria, Investment Analyst, City of Grand Rapids	1.0	2.0	1.0
Fri., Jan 20 12:45-2:45 pm	Legislative Update Learn the latest from “behind the scenes” on what is happening with Michigan legislature and its impact on the treasurer’s responsibilities.	Judy Allen, MTA John LaMacchia, MML	1.0		1.0
Fri., Jan 20 3:00-4:30 pm	Recognizing and Guarding Against the Three Sides of the Fraud Triangle This presentation provides insight into the mindset of a fraudster, focusing on the three sides of the fraud triangle: Motivation, Opportunity, and Rationalization. Learn how to combat each side of the fraud triangle.	Jeffrey Collins Attorney, Author, Speaker & Coach Closing Keynote Address	.75	1.5	.75