



# 2024 WINTER WORKSHOP

January 18-19 – Hilton Garden Inn West, Lansing

## Point Tally Sheet

CPFA - Certified Public Finance Administrator; ACPFA – Advanced CPFIM;

MiCPT - Michigan Certified Professional Treasurer

Use this sheet to keep track of education points earned at the 2024 Winter Workshop.

There are a possible 5.13 CPFA points, 1.0 ACPFA points and 5.13 MiCPT points.

Instruction Time	Topic	Speaker(s)	CPFA Points	ACPFA Points	MiCPT Points
Thurs., Jan 19 1:00-3:00 pm	<b>The Life of a Treasurer</b> This panel discussion will present important dates and reports that every treasurer (and deputy, and assistant) should know. Information will be tailored to include cities, townships, villages and counties.	Panelists: Rande Listerman, Village of Pentwater; Barb Fandell, City of Ithaca; Bret Padgett, Comstock Charter Township; Melinda Weaver, Calhoun County	1.0	0	1.0
Thurs., Jan 19 3:15-5:00 pm	<b>Settlement and Tax Rolls – Tips &amp; Tricks</b> This panel discussion will illustrate the importance of good relationships between county and local units to accomplish treasury tasks. Discussion will center on setting up a tax roll, how to prepare for settlement, and forfeiture and foreclosure.	Rachel Piner, Ingham County; Julie Pray, City of Davison; Karin Tebeau, Delhi Charter Township; Carla Vandefifer, Genesee County.	.88	0	.88
Fri., Jan 20 8:30-9:30 am	<b>Economic Update: Why You Should Care About the Market</b> An in depth discussion on the economy based on market indicators as we head in to 2024 and review of investment best practices for public entities.	Mike Kloack, Meeder Investments	.5	1.0	.5
Fri., Jan 20 9:45-11:45 am	<b>Legislative Update</b> Learn the latest from “behind the scenes” on what is happening with Michigan legislature and its impact on the treasurer’s responsibilities.	July Allen, Michigan Township Association and Jennifer Rigterink, Michigan Municipal League	1.0	0	1.0
Fri., Jan 20 12:45-2:45 pm	<b>Protect Your Office from the Unknown</b> This panel discussion will present the importance of internal controls for protecting your office from both internal and external threats and how to mitigate threats by being prepared with cross training, succession planning and controlling access.	Brian Camiller, Plante Moran; Curtis Dancer, City of Alma; Trisha Gough, Horizon Bank; Michael Pettigrew, City of Ann Arbor	1.0	0	1.0
Fri., Jan 20 3:00-4:30 pm	<b>When You Hear Hoofbeats, It May Be a Zebra</b> Daniel Porter shares his experience with fraudsters to help you prepare for if and when you face a fraud threat. Daniel will discuss how the obvious explanation isn’t always the correct one. His captivating case studies will explore the more common symptoms of fraud that are often misdiagnosed. You’ll learn: how fraudsters think; how to identify fraud red flags, and how to separate mistakes from fraud.	Daniel Porter, Closing Keynote Speaker	.75	0	.75