



# 2019 Winter Workshop

January 17-18 – Crowne Plaza West, Lansing, Michigan

## CPFA/ACPFA/MiCPT 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 2019 Winter Workshop.*

*There are a possible 5.0 CPFA points, 3.0 ACPFA points and 5.0 MiCPT points for this event.*

Instruction Time	Topic	Speaker	CPFA Points	ACPFA Points	MiCPT Points
Thurs., Jan 17 1:00-3:00 pm	<b>A Day in the Life of a Treasurer</b> Hear from a seasoned treasurer and past MMTA President on the basic requirements of any treasurer and the importance of written procedures, internal controls, cash handling, financial reporting and more.	Janice Thelen, Treasurer, Watertown Charter Township	1.0		1.0
Thurs., Jan 17 3:15-5:00 pm	<b>What To Do and When To Do It for Cities, Villages and Townships</b> Insights on a detailed schedule of responsibilities - the “mays” vs. musts,” statutory tax topics and department of treasury deadlines - F65, Act 51, PA 202.	Janice Thelen, Treasurer, Watertown Charter Twp.  Barb Fandell, Treasurer City of Ithaca and Marie Sherry, Treasurer, City of Dexter (formerly Village of Dexter)	.875		.875
Fri., Jan 18 8:30-10:00 am	<b>KEYNOTE: Tales from the Front: Fraud in Local Government</b> No local government is immune to internal fraud. Corruption, employee misappropriation of assets, and financial statement abuse are significant problems. Hear front-line stories, how they were discovered and what could have been done to prevent them.	Daniel Porter, Certified Fraud Examiner	.75	1.5	.75
Fri., Jan 18 10:15-11:45 am	<b>Breakout: Back to Basics Investing</b> A refresher course on the basics of investing in a rising rate environment and products allowed under PA-20. Discuss investment and cash management policies, review what municipalities should expect from their brokers and agents.	Jason Headings, Senior Vice President of Public Funds, Meeder Investment Management	.75		.75
Fri., Jan 18 10:15-11:45 am	<b>Breakout: Nuts &amp; Bolts of Banking</b> Learn about products that are available from banks for municipalities with limited investment funds, what rising interest rates mean, and how to foster a relationship with your banker.	L. Kyle, Farner, Vice President of Municipal Finance and Tammy Kerr, Vice President of Treasury Management, Horizon Bank	.75		.75
Fri., Jan 18 1:00-2:45 pm	<b>Legislative Update</b> An up-to-date look at newly adopted and in-process legislation and its impact on your office, your community and your residents.	Judy Allen, MTA and Chris Hackbarth, MML	.875		.875
Fri., Jan 18 3:00-4:30 pm	<b>Engaging with your Legislators</b> Understanding the importance of connecting with your legislators and the best methods to effectively influence legislators on the topics that matter to you and your community.	Mike Compagnoni, Midwest Strategy Group	.75	1.5	.75