

## CTAO Fall Conference

### Course Description Quick Guide

Course Name	Course Description
<p><b>An Update on Investment Topics Faced by County Treasurers</b></p> <p>Jason Click, President Public Funds, Meeder Investment Management, Elizabeth Lewis, Director of Legislative and Policy Affairs, Ohio Treasurer of State, Dennis Yacobozzi, President &amp; CEO, United American Capital Corporation (UACC), Jason Headings, Vice President Public Funds, Meeder Investment Management</p>	<p>Meeder and UACC will present collaborative perspective on the current investment environment. This session will provide participants with an update on current topics/issues facing County Treasurers today. A few of the topics that will be covered for participants include an update on the Ohio Pooled Collateral Program, trends in current bank rates and practices, and an economic forecast.</p> <p>Lizz Lewis will also be providing an update on OPCS and answering some processing questions that have recently arisen re: collateralization.</p>
<p><b>The Ohio County Investment Game Show</b></p> <p>Ryan K. Nelson, CFA, Co-Founder/ Portfolio Manager, RedTree Investment Group, Jennifer C. Trowbridge, CFA, Managing Principal &amp; Portfolio Manager, RedTree Investment Group</p>	<p>This interactive session will focus on clarifying various points of the Ohio Revised Code as it relates to authorized investments and investing in today's challenging market environment. Designed to be an engaging session, several County treasurers will compete in a game show environment with the opportunity for an open dialogue, including the entire audience, available following each question.</p>
<p><b>Receivables Automation: What's Here &amp; What's Coming</b></p> <p>Bryan White, Vice President, Institutional Government and Nonprofit Banking, Huntington Bank, Jennifer James, Vice President, Treasury Management Officer, PNC Bank</p>	<p>This session will be a high-level overview of explaining Automation and how it can impact the receivables process for Treasurers. In addition, with block chain technology on the rise, PNC will explain the process of block chain technology, the benefits of using block chain, and its development within the industry.</p>
<p><b>Sell on your terms. Tax Certificate Sale Terms &amp; Technology.</b></p> <p>Donald Miles, Director, FIG Capital Investments, LLC</p>	<p>Roughly forty (and counting) Ohio counties sell tax certificates, but no two counties conduct their sales in the same way or under the same terms. This session will review what Tax Certificate Sale terms a Treasurer has the discretion to set under ORC 5721.33 and how a Treasurer can tailor the terms of a sale to best meet its needs and still benefit its taxpayers.</p> <p>The session will also review how technology can give Counties real-time 24-hour visibility into the status of their certificates, even after a sale to a 3<sup>rd</sup> party. Improve Collections with less effort &amp; more transparency.</p> <p>PLEASE NOTE: THIS CLASS IS INTENDED TO BE AN INTRODUCTORY LEVEL CLASS FOR NEWER COUNTY TREASURERS</p>
<p><b>Evaluating and Selecting a Tax Lien Purchaser for your County</b></p> <p>Mark Laughlin, Founder &amp; CEO, NAR Solutions</p>	<p>This session will provide participants with a framework to evaluate and select a tax lien purchaser by(1st) helping them identify the criteria and outcomes important to their specific circumstances /requirements, and (2nd) to apply those criteria in an effective and informed selection process.</p> <p>PLEASE NOTE: THIS IS THE SECOND COURSE OFFERING DURING THE SAME TIME RE: TAX LIENS THAT IS INTENDED FOR MORE EXPERIENCED TREASURERS</p>

**Fraud Awareness Overview**

Chuck Peirano, Corporate  
Enterprise Fraud Program  
Director, Huntington National  
Bank

This session will cover the importance of remaining vigilant against fraud, provide a review and examples of different types of fraud attacks; tips to defend against fraud by updating operating systems, securing firewalls, dual approval, and dedicated PC for online banking.