

OASBO NW Chapter Meeting Course Description Quick Guide

Course Name	Course Description
Market Trends and Bond Basics Michael McCullough, Consultant, Morgan Stanley	<p>This course covers Market observations that pertain to the interest of School treasurers as it relates to their investment portfolios. This includes yield curve analysis, trends in Fed policy, and notable nuances to recent rate movements. Also to be covered will include bond analysis with price variations vs. yield (discounts vs. premiums).</p> <p>Statement of Accreditation Rationale: Financial market research and Bond yield analysis.</p>
Legal Perspective for Ohio's School Treasurers Edward Cavezza, Partner, Dinsmore & Shohl LLP, Jennifer Tomlin, Partner, Scott Scriven LLP	<p>This course covers changes in the Internal Revenue Code impacting opportunities to benefit schools when issuing debt.</p> <p>Co-presenter, Jennifer Tomlin will speak regarding Fraud in the Public Schools; Property Valuation Issues; and Triggering the Americans with Disabilities Act Process and Initial Steps to Determining if an Employee is Qualified.</p> <p>Statement of Accreditation Rationale: The course content offers a valuable review of when schools may issue bonds under the new tax code, an update of H.B. 343 and school district challenges to property tax values. ADA process and procedure will also be addressed.</p>
Tax Levy Options: Changes, Proposed Changes, Considerations for Treasurers and Boards of Education and Traps for the Unwary Rick Manoloff, Partner, Squire Patton Boggs LLP, John S. Larson, Partner, Squire Patton Boggs	<p>A discussion of school district tax levy options, past, and present, legal and practical considerations for Treasurers and Boards of Education in choosing the “right” levy to request and recent and proposed changes in tax levy statutes and procedural requirements - traps for the unwary</p>
Card Management Best Practices Kevin M. Grobelny, Senior Vice President, PNC Bank, Laura DiFilippo, Senior Sales Associate, Ohio Public Finance, PNC Bank	<p>The central goal of this course is to explain to school officials the importance of credit card management and best practices throughout the industry. We will provide insight into current fraud trends and card industry initiatives, and describe how to protect information and utilize new card technology. This seminar will cover other important topics such as setting card controls and security measures that school districts can implement to help mitigate risks and we will share other best practices from schools that have effectively implemented procedures and policies to hold card users accountable and provide a system of checks and balances. Lastly, we will provide an overview of the recent passed card legislation and discuss how to be in compliance with these new requirements.</p> <p>Statement of Accreditation Rationale: The course content is applicable to School business officials as this session offers important measures for quality controls, cash management and fraud prevention.</p>