

Ohio Treasurer's Cincinnati CPIM Boot Camp Course Description Quick Guide

Course Name	Course Description
Registration and Breakfast	
<p>General Session and Market Update-Room 111 Ted Sumnar, Senior VP and Managing Director, Institutional Investments, Huntington Capital Markets, Jim McCourt, Portfolio Manager, Meeder Investment Management, Jonathan Azoff, Director of Debt Management & Senior Counsel, Ohio Treasurer of State, Jennifer C. Trowbridge, CFA, Managing Principal & Portfolio Manager, RedTree Investment Group</p>	<p>This panel discussion will provide a current market update and share with participants how these market developments may impact every day job duties. Topics will include interest rates as they relate to STAR Ohio, STAR Plus, and general deposits. Additional discussion will cover world news and events, various federal data points, preparing for regulatory reform, and asset allocation tips. The course will conclude with an overview of the Ohio Market Access Program (OMAP), a credit enhancement program for municipal notes offered by the Treasurer's Office.</p>
<p>FIN 109: Basics of Borrowing-Room 105 Allison Binkley, Partner, Squire Patton Boggs LLP, Brian Cooper, Principal, Umbaugh</p>	<p>This course introduces participants to public finance. We will first generally define debt and outline its purpose and limitations per state law, followed by a discussion of various types of debt and financing, including notes and bonds, lease obligations, and loans. Finally, we will give an overview of the components of a bond, credit ratings, and roles involved in borrowing.</p>
<p>ETH 228: The Ohio Ethics Law - Upholding Trust in Government (2)- Room 110 Susan Willeke, Education & Communications Administrator, Ohio Ethics Commission</p>	<p>This lively and interactive session explores recent issues and updates regarding the Ohio Ethics Law. Join us for a discussion on the latest in conflicts of interest, public contracts and more!</p>
<p>INV 106: Basics of Investing-Room 105 Jennifer C. Trowbridge, CFA, Managing Principal & Portfolio Manager, RedTree Investment Group</p>	<p>This course will provide you with the foundation to develop a proper investment program. Ohio investment law is very specific as to what you can and cannot do. Topics to be discussed will include a history of Ohio investment law, developing an investment policy, eligible investments and the role of vendors.</p>
Lunch	
<p>Panel Discussion: Financial Technology Trends (Digital Transformation, Blockchain Technologies)-Room 111 Jonathan Azoff, Director of Debt Management & Senior Counsel, Ohio Treasurer of State, Anthony Dean, Lead Engineer, Safechain, Doug McCollough, Chief Information Officer, City of Dublin, Tom Walsh, Senior Vice President, PNC Bank</p>	<p>This panel discussion will be a basic level overview of what Blockchain is and how local government can use this new technology.</p>

<p>General Session Cyber Security-Room 111 Dusten Kohlhorst, Director of IT Services, Ohio Treasurer of State, Stacey Russell, Fiscal Officer, Muskingum County Library System</p>	<p>Over view of cyber security</p>
<p>ACC 210 Effective Internal Controls, Policies and Procedures-Room 109 Loren S. Crisp, Chief Auditor, SW Region, Auditor of State</p>	<p>An overview of internal controls that you should have in place in your office. Presented by the Ohio Auditor of State's Office.</p>