

Ohio Treasurer's Cleveland CPIM Academy Course Description Quick Guide

Course Name	Course Description
Registration and Breakfast	
General Session and Market Update-Room 126 Connor Chambers, Huntington Bank, Jim McCourt, Portfolio Manager, Meeder Investment Management, Jonathan Azoff, Director of Debt Management & Senior Counsel, Ohio Treasurer of State, Ryan K. Nelson, CFA, Co-Founder/ Portfolio Manager, RedTree Investment Group	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.
ETH 228: The Ohio Ethics Law - Upholding Trust in Government (1)- Room 203 Susan Willeke, Education & Communications Administrator, Ohio Ethics Commission	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!
ETH 228: The Ohio Ethics Law - Upholding Trust in Government (2)- Room 203 Susan Willeke, Education & Communications Administrator, Ohio Ethics Commission	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!
OPCS Training- Room 130 Zach Prouty, Legislative Liaison, Treasurer of State, Patrick Castleman, Compliance Analyst 2- Trust Department, Treasurer of State	This discussion will provide an overview of the Ohio Pooled Collateral Program. It will include the benefits of the program, details on how to effectively use the program, and a live demonstration of the system.
General Session: Cyber Fraud-Room 126 Dusten Kohlhorst, Director of IT Services, Ohio Treasurer of State, Stacey Russell, Fiscal Officer, Muskingum County Library System	Over view of cyber security
Lunch	
Current Trends in Public Finance-Room 230 Andrew Laskey, Vice President, RBC Capital Markets, Eileen Stanic, CTP, Senior Public Funds Advisor, Meeder Investment Group	This session will take a look at how current economic and market conditions impact your debt issuance.

<p>Panel Discussion: Financial Technology Trends (Digital Transformation, Blockchain Technologies)-Room 126</p> <p>Dusten Kohlhorst, Director of IT Services, Ohio Treasurer of State, Randy Cole, EVP & Chief Solutions Officer, Ownum, Robert Zwink, Co-Founder and CEO, Safechain, 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>INV 357 Investing in Today's Interest Rate Environment-Room 230</p> <p>Jim McCourt, Portfolio Manager, Meeder Investment Management, Eileen Stanic, CTP, Senior Public Funds Advisor, Meeder Investment Group</p>	<p>This class will provide strategists to make the most of their portfolio given the current rate environment.</p>
<p>ACC 210 Effective Internal Controls, Policies and Procedures-Room 130</p> <p>Kaitlyn Darno, Auditor Manager, 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>
<p>MGT 231 Solving for Retention-Room 230</p> <p>Cindy Mills, Vice President, Wellness Specialist, Employee Benefits, Hunting Bank, Charlotte Schaar, Wellness Product Specialist, Hunting Bank</p>	<p>When health and well-being are actively promoted by a meaningful employee benefits program, companies are 2.5X more likely to be viewed as a top performing organization</p> <p>To be a top organization employers must win the hearts and minds of their employees. Among employees who are inspired by their company culture to make healthy choices, 80% are engaged in their jobs. With Millennials making up the majority of the workforce, wellbeing programs are more important than ever in attracting and retaining employees. Millennials differ in their expectation of work and loyalty than their parents. They also view health differently with a more total wellbeing mindset. By incorporating the most innovative and strategic wellbeing programs companies can have an edge over the competition.</p>
<p>FIN 348 Tax Exempt Financing-Room 130</p> <p>Diana Vicen, Senior Associate Attorney, Dinsmore & Shohl LLP, Eric Prall, Investment Banker and financial advisor to municipal issuers., Hilltop Securities Inc</p>	<p>This class will take an advanced look at your options for issuing tax-exempt debt</p>
<p>TOS Programs Update-Room 203</p> <p>James Bernholtz, Economic Development Officer, Treasurer of State, Lisa Eisenberg, Deputy Director of Debt Management, Ohio Treasurer of State</p>	<p>An overview of programs administered by the Treasurer of State's office. Including, OMAP, Linked Deposits, and STABLE.</p>