

Ohio Treasurer's Columbus CPIM Academy Course Description Quick Guide

Course Name	Course Description
Registration and Breakfast	
General Session and Market Update-WD 400AB Jonathan Azoff, Director of Debt Management & Senior Counsel, Ohio Treasurer of State, Ryan K. Nelson, CFA, Co-Founder/Portfolio Manager, RedTree Investment Group, John Cindric, Managing Director, Institutional Investment Group, Huntington Investment Company, Jason Headings, Vice President Public Funds, Meeder Investment Management	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)- WD400C 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!
Treasurer of State Programs Update-WD 414 James Bernholtz, Economic Development Officer, Treasurer of State	An overview of programs administered by the Treasurer of State's office. Including, OMAP, Linked Deposits, and STABLE.
INV 357 Investing in Today's Interest Rate Environment-WD 412 Jason Headings, Vice President Public Funds, Meeder Investment Management	This class will provide strategists to make the most of their portfolio given the current rate environment.
ETH 228: The Ohio Ethics Law - Upholding Trust in Government (2)-WD 400C 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-WD 412 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.

ACC 210 Effective Internal Controls, Policies and Procedures-WD 414 Douglas Ferguson, CFE, CGFM, Senior Audit Manager, Ohio Auditor of State	An overview of internal controls that you should have in place in your office. Presented by the Ohio Auditor of State's Office.
SEC- 210 Cyber Fraud-WD 412 Dusten Kohlhorst, Director of IT Services, Ohio Treasurer of State, Stacey Russell, Fiscal Officer, Muskingum County Library System	With the increase use of electronic banking and fiscal transactions, the risk of financial security breaches is great. This course will discuss the steps that a public entity should take if there is a security breach, as well as best practices to guard against fraud. It will also discuss other types of fraud that can occur from the inside that can result in the loss of public funds.
FIN 348 Tax Exempt Financing-WD 400C Jennifer Blaser, Legal Counsel, Dinsmore & Shohl LLP, Marc Kamer, Legal Counsel, Dinsmore & Shohl LLP	This class will take you through your options for issuing tax exempt debt.
MGT 231 Solving for Retention-WD 414 Charlotte Schaar, Wellness Product Specialist, Hunting Bank, Cindy Mills, Vice President, Wellness Specialist, Employee Benefits, Hunting Bank	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 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.
Lunch	
General Session: Current Trends in Public Finance-WD 400AB Eileen Stanic, CTP, Senior Public Funds Advisor, Meeder Investment Group, Andrew Laskey, Vice President, RBC Capital Markets	This session will take a look at how current economic and market conditions impact you debt issuance.
Panel Discussion: Financial Technology Trends (Digital Transformation, Blockchain)-WD 400AB Dusten Kohlhorst, Director of IT Services, Ohio Treasurer of State, Mary Butler-Everson, SVP Healthcare Product Innovations, PNC Bank, Tony Franco, Co-Founder and CEO, Safechain	This panel discussion will be a basic level overview of what Blockchain is and local government can use this new technology.