

## Ohio Treasurer's Findlay CPIM Boot Camp

### Course Description Quick Guide

Course Name	Course Description
<b>Registration and Breakfast</b>	
<b>General Session and Market Update-EC 111</b> John Cindric, Managing Director, Institutional Investment Group, Huntington Investment Company, Jason Headings, Vice President Public Funds, 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	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.
<b>FIN 109: Basics of Borrowing-EC 165</b> Allison Binkley, Partner, Squire Patton Boggs LLP, Brian Cooper, Director, Baketilly Municipal Advisors	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.
<b>ETH 228: The Ohio Ethics Law - Upholding Trust in Government (2)-EC 172</b> 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!
<b>Current Trends in Public Finance-EC 173</b> Eileen Stanic, CTP, Senior Public Funds Advisor, Meeder Investment Group, Andrew Laskey, Vice President, RBC Capital Markets	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.
<b>Lunch</b>	
<b>General Session: Cyber Security-EC 111</b> Dusten Kohlhorst, Director of IT Services, Ohio Treasurer of State	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.

**Panel Discussion: Financial  
Technology Trends (Digital  
Transformation, Blockchain  
Technologies)-EC 111**

Dusten Kohlhorst, Director of IT  
Services, Ohio Treasurer of  
State, Doug McCollough, Chief  
Information Officer, City of  
Dublin, Pete Gordon, Columbus  
Collaboratory , Josh Green,  
CEO& Founder, Software Verde

This panel discussion will be a basic level overview of what Blockchain is and how  
local government can use this new technology.

**INV 106: Basics of Investing-EC  
165**

Jennifer C. Trowbridge, CFA,  
Managing Principal & Portfolio  
Manager, RedTree Investment  
Group

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.