

OAPT 2017 HOT TOPIC



This Hot Topic Seminar is packed with information to assist public finance officers in the performance of their duties. Topics include a legislative update on Workers Compensation and deferred compensation. The Investment Workshop is a hands on session that includes improving investment performance. The Treasurer of States Office will provide information on the changes in collateral in Ohio.

Host Organization Ohio Association of Public Treasurers (OAPT)

Sal Talarico, Director of Education

(440) 915-2057

oapteducation@gmail.com

Event Date 4/7/2017

of Hours Available 4.25

Location Der Dutchman Restaurant

720 SR 97 W

Bellville, OH 44813

Onsite Contact Jack Krise

Administrator

Ohio Association of Public Treasurers

216-577-3076

ohiotreasurers@gmail.com

Conference Website

<http://www.ohioapt.org>

Required Materials

[Course Description Quick Guide](#)

Other Event Materials

[MyCPIM worksheet](#)

Friday 4/7/2017

9:15 AM - 9:45 AM

Course Name	Speaker(s)	Hours Available
Essentials of Fixed Income Investing	Marcia Clark, CFA, Lead Instructor and Course Designer	0.5

9:45 AM - 10:45 AM

Course Name	Speaker(s)	Hours Available
Case Study: Continually Adapting to Minimize Risk and Maximize Return	Joseph Farris, Investment & Cash Management Officer, Cuyahoga County, Susan Munson, CFP®, CFIP, Founder & CEO, Fixed Income Academy, L.P.	1

10:45 AM - 12:15 PM

Course Name	Speaker(s)	Hours Available
Putting Learning Into Practice: Portfolio Management Foundations and Simulations	Michael Nguyen, SVP, Director of Investment Solutions	1.5

1:15 PM - 2:30 PM

Course Name	Speaker(s)	Hours Available
Changes in Ohio Collateral	Elizabeth Lewis, Director of Legislative and Policy Affairs, Ohio Treasurer of State, Walter Myers, Director of Trust, Ohio Treasurer of State	1.25

