

# Ohio Treasurer's Cincinnati CPIM Academy

## Full Event Schedule

Thursday, September 12, 2019

	Room 105	Room 108	Room 109	Room 110	Room 111
7:30 AM - 8:30 AM	<b>Registration and Breakfast</b>				
8:30 AM - 9:20 AM	xxx	xxx	xxx	xxx	<p><b>General Session and Market Update-Room 111</b> Jonathan Azoff, Director of Debt Management &amp; Senior Counsel, Ohio Treasurer of State, Jim McCourt, Portfolio Manager, Meeder Investment Management, Jennifer C. Trowbridge, CFA, Managing Principal &amp; Portfolio Manager, RedTree Investment Group, Ted Sumnar, Senior VP and Managing Director, Institutional Investments, Huntington Capital Markets</p>
9:30 AM - 10:20 AM	xxx	<p><b>INV 357 Investing in Today's Interest Rate Environment-Room 107/108</b> Jim McCourt, Portfolio Manager, Meeder Investment Management, Eileen Stanic, CTP, Senior Public Funds Advisor, Meeder Investment Group</p>	<p><b>OPCS Training-Room 109</b> Zach Prouty, Assistant Manager of Treasury Services, Treasurer of State, Patrick Castleman, Compliance Analyst 2- Trust Department, Treasurer of State</p>	<p><b>ETH 228: The Ohio Ethics Law - Upholding Trust in Government-Room 110</b> Susan Willeke, Education &amp; Communications Administrator, Ohio Ethics Commission</p>	xxx
10:30 AM - 11:20 AM	xxx	<p><b>Current Trends in Public Finance-Room 107/108</b> Andrew Laskey, Vice President, RBC Capital Markets, Eileen Stanic, CTP, Senior Public Funds Advisor, Meeder Investment Group</p>	<p><b>ACC 210 Effective Internal Controls, Policies and Procedures-Room 109</b> Loren S. Crisp, Chief Auditor, SW Region, Auditor of State</p>	<p><b>ETH 228: The Ohio Ethics Law - Upholding Trust in Government (2)-Room 110</b> Susan Willeke, Education &amp; Communications Administrator, Ohio Ethics Commission</p>	xxx

<p><b>11:30 AM - 12:20 PM</b></p>	<p><b>INV 106: Basics of Investing-Room 105</b> Jennifer C. Trowbridge, CFA, Managing Principal &amp; Portfolio Manager, RedTree Investment Group</p>	<p><b>FIN 348 Tax Exempt Financing-Room 107/108</b> Diana Vicen, Senior Associate Attorney, Dinsmore &amp; Shohl LLP, Eric Prall, Investment Banker and financial advisor to municipal issuers., Hilltop Securities Inc</p>	<p><b>xxx</b></p>	<p><b>TOS Programs Update-Room 110</b> James Bernholtz, Economic Development Officer, Treasurer of State, Lisa Eisenberg, Deputy Director of Debt Management, Ohio Treasurer of State</p>	<p><b>xxx</b></p>
<p><b>12:20 PM - 1:20 PM</b></p>	<p><b>Lunch</b></p>				
<p><b>1:20 PM - 2:10 PM</b></p>	<p><b>xxx</b></p>	<p><b>xxx</b></p>	<p><b>xxx</b></p>	<p><b>xxx</b></p>	<p><b>General Session: Cyber Fraud-Room 111</b> Dusten Kohlhorst, Director of IT Services, Ohio Treasurer of State, Stacey Russell, Fiscal Officer, Muskingum County Library System</p>
<p><b>2:20 PM - 3:10 PM</b></p>	<p><b>xxx</b></p>	<p><b>xxx</b></p>	<p><b>xxx</b></p>	<p><b>xxx</b></p>	<p><b>Panel Discussion: Financial Technology Trends (Digital Transformation, Blockchain Technologies)-Room 111</b> Dusten Kohlhorst, Director of IT Services, 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>