

# Ohio Treasurer's Columbus CPIM Academy

## Full Event Schedule

Thursday, April 12, 2018

Room 404

Room 407

Room 409

Room 435

Room 437

7:30 AM - 8:30 AM

Registration and Breakfast

8:30 AM - 9:20 AM

xxx

xxx

xxx

**General Session: Market Update**  
JD Pisula, Director of Investments, Ohio Treasurer of State, Michael J. Valo, Managing Director, Huntington Capital Markets, Zachary Amendolea, CFA, Investment Associate, Ohio Treasurer of State

xxx

9:30 AM - 10:20 AM

xxx

xxx

**FIN 162: Who's Who - Roles in a Bond Issue**  
Jonathan Azoff, Director of Debt Management & Senior Counsel, Ohio Treasurer of State, Brian Regueiro, Senior Managing Consultant, PFM, Lisa Eisenberg, Deputy Director of Debt Management, Ohio Treasurer of State

xxx

**ETH 228: The Ohio Ethics Law - Upholding Trust in Government (1)**  
John Rawski, Advisory Attorney, Ohio Ethics Commission

10:30 AM - 11:20 AM

**ACC 201: How to Prepare for an Audit**  
Jim Rader, Asst. Chief of Central Region, Office of the Ohio Auditor of State

xxx

**FIN 242: Official Statements and Continuing Disclosure**  
Jennifer Blaser, Legal Counsel, Dinsmore & Shohl LLP, Emily Cannon, Director, PNC Capital Markets

xxx

**ETH 228: The Ohio Ethics Law - Upholding Trust in Government (2)**  
John Rawski, Advisory Attorney, Ohio Ethics Commission

11:30 AM - 12:20 PM	<b>SEC 161 Electronic Banking and Cyber Security</b> Dusten Kohlhorst, Director of IT Services, Ohio Treasurer of State, Stacey Russell, Fiscal Officer, Muskingum County Library System	xxx	<b>FIN 336: The Finer Details of Structuring Bond Issues</b> David Tiggett, Director, KeyBanc Capital Markets, Samuel Adams, Vice President - Public Finance Group, KeyBanc Capital Markets, Inc.	xxx	<b>INV 222: Investment Reporting</b>
12:20 PM - 1:20 PM	Lunch				
1:20 PM - 2:10 PM	xxx	xxx	xxx	<b>General Session: Current Trends in Public Funds: Investing &amp; Financing</b> Ryan K. Nelson, CFA, Co-Founder/ Portfolio Manager, RedTree Investment Group, Katie Kleinfelder, Director, RBC Capital Markets	xxx
2:20 PM - 3:10 PM	<b>Round Table Discussion: Townships and Villages</b> Taylor Wright, Ohio Treasurer of State, Amanda Merritt, Ohio Treasurer of State	<b>Round Table Discussion: Libraries, Parks and Special Districts</b> Jonathan Azoff, Director of Debt Management & Senior Counsel, Ohio Treasurer of State, Nicholas Hancart, Ohio Treasurer of State	<b>Round Table Discussion: Counties and Municipalities</b> Jeremy Rzepka, Deputy Legal Counsel, Ohio Treasurer of State, Michael Fracassa, Ohio Treasurer of State	xxx	<b>Round Table Discussion: School Districts and ESCs</b> Andrew Coutts, Ohio Treasurer of State, Mary Crall, Ohio Treasurer of State