

CTAO Fall Conference & Annual Meeting

Course Description Quick Guide

Course Name	Course Description
<p>Don't Get Caught Up "S" Creek without an Investment Plan</p> <p>Ryan K. Nelson, CFA, Co-Founder/ Portfolio Manager, RedTree Investment Group, Jennifer C. Trowbridge, CFA, Managing Principal & Portfolio Manager, RedTree Investment Group</p>	<p>The session will follow the mission of CPIM by providing investment knowledge to the attendees. The panel discussion will provide information and clarification on allowable investments under Ohio Revised Code Chapter 135 as well as insight on how to invest County funds in today's challenging and low interest rate environment. Keytenets will focus on how to mitigate investment risk while maximizing returns. Participants can take the knowledge learned in a fun, but yet informative session back to respective County to make prudent investment and bank related decisions.</p>
<p>How to Utilize Technology to Evaluate your Delinquent Tax Portfolio and Choose the Appropriate Collections Tool to Increase Tax Revenue</p> <p>Dawn Hoosier, Chief Director of Gov't Relations & Market Development, NAR Ohio, LLC, Douglas Badaszewski, New Markets and Governmental Relations, NAR Solutions Inc</p>	<p>This session will show the County Treasurers how to utilize their technology to capture data which will assist them in determining the best tools for collections. Furthermore, this session will review each tool and where it fits into their current collection efforts and cycle.</p>
<p>Evolution of the Federal Reserve</p> <p>Jason Headings, Vice President Public Funds, Meeder Investment Management, Eileen Stanic, CTP, Senior Public Funds Advisor, Meeder Investment Group, Scott Gruber, Client Portfolio Manager, Meeder Investment Management</p>	<p>The Federal Reserve's swift response to COVID-19 demonstrated their ability to effectively use monetary policy tools to prevent a health care crisis from evolving into a financial crisis. We will look back to the formation of the Federal Reserve and past actions to gain perspective on the current Federal Reserve to help determine whether this time is different and what this may mean for your investment portfolio. We will also provide an update on the current economic factors that may drive the future path of interest rates.</p>
<p>The Need for Further Foreclosure Reform in Ohio</p> <p>Tony Fiore, Esq, Of Counsel, Kegler, Brown, Hill, & Ritter LPA, Melissa Messina-Lanthorn, Esq., MBA, Of Counsel, Manley Deas Kochalski LLC,</p>	<p>The COVID-19 pandemic's impact has been devastating across Ohio. While some individuals, businesses and communities are slowly recovering others may never recover at all. On the foreclosure front, moratoriums have encouraged creditors and borrowers to work together on short-term solutions, but the financial impact on families may be too much to bear. A decade ago the 2008-09 Great Recession caused enormous backlogs in foreclosure cases, but reforms enacted back in 2016-2018 helped reduce such delays and make the process easier for local, third party bidders to buy property online. But, there are several issues needing attention that continue to add unnecessary costs and time to process a foreclosure case. More costs of a foreclosure case hurt borrowers and lead to longer timeframes, which can lead to an increase in vacant and abandoned properties. Higher costs and longer timeframes also harm the communities that foreclosed properties are in. In addition, they cut into any equity in the property that the borrower may have, making it more difficult for them to move past the financial issues they are facing. This session will discuss the details of how SB 212, sponsored by Sen. Bob Hackett, attempts to address the remaining issues in the foreclosure process in Ohio.</p>

**Public Deposits Panel
Discussion**

Don Boyd, VP, State
Government Relations &
General Counsel, Ohio Bankers
League, Patrick J. McCarthy,
Senior Vice President,
Government Banking Regional
Manager, The Huntington
National Bank, Stanley A
Uchida, Vice President , Park
National Bank, Charles O
Moore, President, Central Ohio,
The Middlefield Banking
Company

This panel presentation will cover all aspects of the relationship between county treasurers, local governments, and banks. The panel will focus on utilization and execution of depository contracts, local investment opportunities, and how best to interact with banks when receiving large deposits, such as recent American Rescue Plan Act (ARPA) funds. Additionally, bankers will discuss the various options county treasurers have to invest local funds. Lastly, the panel will cover recent legislative updates from the banker's perspective and how they further the collaborative efforts between county treasurers, the Treasurer of State's office, and banks.