

Certified Public Finance Administrator

Application for Advanced Certification

GENERAL ELIGIBILITY

Each applicant for Advanced CPFA certification must meet the following general eligibility standards:

1. Applicant, in each year since last CPFA certification, must have been a duly elected or appointed treasurer, deputy or assistant treasurer, employee in or dealing with the office of treasurer, or other principal officer in the public entity who is charged with the performance or supervision of one or more of the following responsibilities: investments, debt or treasury activities.
2. Applicant must have maintained continuous “Active” (see APT US&C’s Bylaws for definitions) member:
 - a. for each of the years since the last CPFA certification; and
 - b. at the time of approval.
3. Applicant must believe in and practice APT US&C’s Code of Ethics (as adopted).
4. Applicant must have a current CPFA certification. Successful completion of the Advanced CPFA will result in automatic renewal of the CPFA and the expiration date of the CPFA will be extended for five years from the date of approval.

APPLICATION

A non-refundable fee of two hundred dollars (\$200.00) in US funds shall accompany the CPFA Application for Advanced Certification. The fee includes application processing, certification plaque, pin, picture and press release.

Forward the application fee (in US funds) along with ONE copy of the typewritten or electronically-completed APPLICATION and all supporting documentation to:

CPFA Certification Committee
APT US&C
7044 S. 13th Street
Oak Creek, WI 53154

The application deadline is June 1st and CPFA designations are formally announced at the following APT US&C’s annual conference.

APPEALS

A candidate whose application is not approved by the CPFA Certification Committee will be notified of the Committee’s decision and the steps needed to receive the credential. Should the candidate disagree with the Committee’s ruling and recommendation on how to earn the necessary points for certification, the candidate may appeal the Committee’s decision. The appeal must be sent in writing within thirty (30) days of notification of the Committee’s decision to APT US&C’s headquarters. The Committee Chair, within thirty (30) days, shall reconsider the circumstances and reverse the decision or submit the appeal to the Board of Directors for final determination.

Please direct any
general questions
to APT US&C
at (414) 908-4947.



ASSOCIATION OF PUBLIC TREASURERS
UNITED STATES & CANADA

Certified Public Finance Administrator Application for Advanced Certification

Name _____
Last First Middle

Title _____

Employer _____

Address _____
Please include both mailing and shipping addresses, if different.

City _____ State/Province _____ Zip _____

Telephone _____ Fax _____

Email Address _____ Date of Last CPFA Certification _____

Name as you would like it displayed on plaque _____

ELIGIBILITY CERTIFICATION

- I am a treasurer, deputy or assistant treasurer, employee in or dealing with the office of treasurer, or principal officer from a public entity charged with the performance or supervision of one or more of the following responsibilities: investments, debt or treasury activities for each year since my last CPFA certification and at the time of this application.
- I have been an "Active" member of APT US&C for each year since my last CPFA certification and at the time of this application
- I affirm my belief in and practice APT US&C's Code of Ethics (as adopted).
- I have enclosed the application fee and understand that it is not refundable.
- I have a current CPFA certification.

I hereby certify that I have read the items listed above and comply with all those items. I also grant permission to APT US&C to verify the accuracy of all statements and enclosures.

Signature _____ Date _____



ASSOCIATION OF PUBLIC TREASURERS
UNITED STATES & CANADA

JOB VERIFICATION

PRESENT POSITION:

(Please enclose documentation of certification of election or a letter verifying election or appointment to office, including dates of service. A Job Verification Form may be used.)

position _____ from _____ to _____

employer _____

responsibilities/job description _____

OTHER POSITION(S) HELD SINCE LAST CPFA CERTIFICATION, IF APPLICABLE:

(Please enclose documentation of certification of election or a letter verifying election or appointment to office, including dates of service. A Job Verification Form may be used.)

position _____ from _____ to _____

employer _____

responsibilities/job description _____

(Use additional sheet(s) as necessary.)

ADVANCED CPFA EXPERIENCE STANDARDS

15 points required ALL experience points must be earned since last certification.	points earned
• completing recognized national professional achievement certification programs related to treasury management (e.g., CCM, CGFM, CPA, CPFO, CMA)	5 per certification
• attending an annual conference of APT US&C	5 per year
• attending a state/province APT association conference*	2 per year
• serving as a committee member for APT US&C or a state/province APT association*	1 per yr per committee
• serving as a committee chair for APT US&C or a state/province APT association*	2 per yr per committee
• serving as a director or parliamentarian of APT US&C or a state/province APT association*	3 per year
• serving as an officer of APT US&C or a state/province APT association*	4 per year
• serving as a mentor with the APT US&C Mentor Program	1 per year
• receiving special awards presented by APT US&C or a state/province APT association	5 per award
• receiving APT US&C's Certified Public Funds Investment Manager certification	2 for Level I 5 for Level II 10 for Level III
* Applicants from states/provinces that do not have an APT state/province association may substitute points from ONE statewide or province-wide organization relating to treasury management.	

APT US&C ANNUAL CONFERENCE OR STATE/PROVINCE CONFERENCE:

(Attach proof of attendance.)

year _____ conference site _____ points _____
year _____ conference site _____
year _____ conference site _____
year _____ conference site _____
year _____ conference site _____
year _____ conference site _____
year _____ conference site _____

(Use additional sheet(s) as necessary.)

COMMITTEE MEMBER/CHAIR OR DIRECTOR/OFFICER:

(Attach proof of service.)

year _____ position held _____ points _____
sponsoring association _____

year _____ position held _____
sponsoring association _____

year _____ position held _____
sponsoring association _____

year _____ position held _____
sponsoring association _____

(Use additional sheet(s) as necessary.)

APT US&C AWARD OR STATE/PROVINCE AWARD:

(Attach proof of award.)

year _____ award name _____ points _____
award association _____
conference site _____

(Use additional sheet(s) as necessary.)

NATIONAL CERTIFICATION PROGRAM:

(Attach proof of certification.)

name of certification _____ points _____
sponsoring organization _____
certification date _____

name of certification _____
sponsoring organization _____
certification date _____

(Use additional sheet(s) as necessary.)

TOTAL EXPERIENCE POINTS (15 points required)

TOTAL _____

ADVANCED CPFA EDUCATION STANDARDS

45 points required

ALL education points must be earned since last CPFA certification
and **ALL** documentation must be included with the application.

points earned

attending an APT US&C approved Advanced Education Program (approval and points contingent on review of program agendas by the CPFA Certification Committee)	1 point per hour of instruction
writing a manual for the APT US&C	25 points per manual
writing an article on a technical topic for <i>Treasury Notes</i> under 500 words (1 point) 501 to 1000 words (2 points) 1001 to 1500 words (3 points) over 1501 words (4 points)	1 - 4 points per article
presenting at State Association or APT US&C conferences or other educational sessions	2 points per hour of instruction
completing (with a C average or better) college courses related to finance	1 point per credit hour

ADVANCED EDUCATION PROGRAMS:

(Attach proof of course completion.)

course title _____ points _____
sponsored by _____ date of completion _____

course title _____
sponsored by _____ date of completion _____

course title _____
sponsored by _____ date of completion _____

(Use additional sheet(s) as needed.)

MANUAL OR NEWSLETTER ARTICLE:

(Attach proof of publication.)

title of manual or article _____ points _____
title of publication _____
number of words (newsletter only) _____ date of publication _____

title of manual or article _____
title of publication _____
number of words (newsletter only) _____ date of publication _____

(Use additional sheet(s) as needed.)

PRESENTING AT A CONFERENCE OR OTHER EDUCATIONAL SESSION:

(Attach proof of presentation.)

title/topic of presentation _____ points _____
sponsoring organization _____
number of hours of instruction _____ date of presentation _____

(Use additional sheet(s) as needed.)

COLLEGE/UNIVERSITY COURSES RELATED TO FINANCE:

(Attach copy of transcript.)

course title and number _____ points _____
college/university _____
location _____ date of completion _____
grade _____ credit hours _____

course title and number _____
college/university _____
location _____ date of completion _____
grade _____ credit hours _____

course title and number _____
college/university _____
location _____ date of completion _____
grade _____ credit hours _____

course title and number _____
college/university _____
location _____ date of completion _____
grade _____ credit hours _____

(Use additional sheet(s) as needed.)

TOTAL EDUCATION POINTS (45 points required)

TOTAL _____

SUMMARY

TOTAL EXPERIENCE POINTS (15 points required)	_____
TOTAL EDUCATION POINTS (45 points required)	+ _____
TOTAL EXPERIENCE AND EDUCATION POINTS (60 points required)	=====



ASSOCIATION OF PUBLIC TREASURERS
UNITED STATES & CANADA



**ASSOCIATION OF PUBLIC TREASURERS
UNITED STATES & CANADA**

JOB VERIFICATION FORM

name _____
last first middle

entity _____

title _____

dates of employment _____ to _____

Duties performed (if not treasury-related, must be administrative, supervisory or managerial):
(Please check all that apply.)

- | | |
|--|---|
| <input type="checkbox"/> investment of entity cash | <input type="checkbox"/> tax collection |
| <input type="checkbox"/> cash flow forecasting | <input type="checkbox"/> banking relationship |
| <input type="checkbox"/> billing and collection of special assessments | <input type="checkbox"/> bond payments |
| <input type="checkbox"/> collection of receivables | <input type="checkbox"/> bond activity |
| <input type="checkbox"/> supervisor/manager | <input type="checkbox"/> other (specify) _____
_____ |

signature of applicant date

signature of mayor, manager or supervisor date

signature of entity Clerk (if elected) date