

# Certified Public Finance Administrator

## Application for Certification

### GENERAL ELIGIBILITY

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

1. Applicant must be 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 been an Active Member (see APT US&C's Bylaws for definition):
  - a. for at least twenty-four months immediately before applying for 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 earned a combined total of 100 experience and education points. A minimum of 40 points must be earned in either education or experience with a maximum of 60 points in the remaining category. Certification expires every five years and must be renewed prior to expiration.

### APPLICATION

A non-refundable fee of two hundred dollars (\$200.00) in US funds shall accompany the CPFA application. The application fee will be waived for the second submission if the first attempt at certification is unsuccessful. The fee includes application processing, certification plaque, pin, picture and press release.

Forward the fee along with 21( cop\ of the typewritten or electronically-completed APPLICATION and all required documentation to

**CPFA Certification Committee**  
**APT US&C**  
**P.O. Box 591**  
**Tawas City, MI 48764**

The application deadline is June 1<sup>st</sup> and CPFA designations are formally announced at the following APT US&C 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 (989) 820-5205.**



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

# Certified Public Finance Administrator

## Application for Certification

Name \_\_\_\_\_  
Last First Middle Initial

Title \_\_\_\_\_

Employer \_\_\_\_\_

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

City \_\_\_\_\_ State/Province \_\_\_\_\_ Zip \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_

Email Address \_\_\_\_\_

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.
- I have been an Active Member of APT US&C for twenty-four months immediately before applying for certification.
- I affirm my belief in and practice APT US&C's Code of Ethics (as adopted).
- I have enclosed the \$200.00 application fee and understand that it is not refundable.
- I understand that, if approved, my certification will expire five (5) years from the date of certification and must be renewed prior to the expiration date. To be eligible for renewal, I must have (1) maintained continuous "Active" or "Associate" membership in APT US&C for each of the five years since certification (includes payment of annual APT US&C membership dues) and (2) earned the required points in any combination of Experience and Education Maintenance Standards.

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**  
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## EXPERIENCE STANDARDS

Work Experience: (within the past 15 years for a maximum of 40 points, no duplicate credit for dual positions)	points	maximum allowed
• experience as a public treasurer as defined in the General Eligibility section	4 per year	40
• administrative, supervisory or managerial experience in government before treasury work	2 per year	20
• administrative, supervisory or managerial experience before treasury work	1 per year	10
<b>TOTAL Work Experience</b>		<b>40</b>
<b>Other Experience:</b>		
• attendance at an annual conference of APT US&C	5 per year	30
• attendance at a state/province APT association conference*	2 per year	12
• service as a committee member for APT US&C or a state/province APT association*	1 per yr per committee	5
• service as a committee chair for APT US&C or a state/province APT association*	2 per yr per committee	10
• service as a director or parliamentarian of APT US&C or a state/province APT association*	3 per year	15
• service as an officer of APT US&C or a state/province APT association*	4 per year	20
• service as a mentor in the APT US&C Mentor Program	1 per year	5
• receiving APT US&C's Certified Public Funds Investment Manager certification	2 for Level I 5 for Level II	7
• completion of recognized national professional achievement certification programs related to treasury management (e.g., CCM, CGFM, CPA, CPFO, CFE, CIA, CMA)	5 per certification	20
• recipient of special awards presented by APT US&C or a state/province APT association	5 per award	15
* <i>A pplicants from states/provinces that do not have an APT state/province association may substitute points from <b>ONE</b> statewide or province-wide organization relating to treasury m anagement.</i>		

**PRESENT POSITION:** (Must enclose certification of election or letter verifying election or appointment to office, including dates of service, to earn points. A Job Verification Form may be used.)

position \_\_\_\_\_ from \_\_\_\_\_ to \_\_\_\_\_ points \_\_\_\_\_  
 employer \_\_\_\_\_ total years \_\_\_\_\_ @ \_\_\_\_\_ per year = \_\_\_\_\_  
 responsibilities/job description \_\_\_\_\_  
 \_\_\_\_\_

**PAST POSITION(S):** (Must enclose certification of election or letter verifying election or appointment to office, including dates of service, to earn points. A Job Verification Form may be used.)

position \_\_\_\_\_ from \_\_\_\_\_ to \_\_\_\_\_ points \_\_\_\_\_  
 employer \_\_\_\_\_ total years \_\_\_\_\_ @ \_\_\_\_\_ per year = \_\_\_\_\_  
 responsibilities/job description \_\_\_\_\_  
 \_\_\_\_\_

(Use additional sheet(s) as necessary.)

**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 _____	
year _____	conference site _____	
year _____	conference site _____	
year _____	conference site _____	
year _____	conference site _____	
year _____	conference site _____	

**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 _____
awarding association _____		
conference site _____		

**CERTIFIED PUBLIC FUNDS INVESTMENT MANAGER:**

(Attach proof of certification.)

year _____	training site _____	level _____	points _____
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**NATIONAL CERTIFICATION PROGRAM:**

(Attach proof of certification.)

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

**TOTAL EXPERIENCE POINTS (minimum 40 points/maximum 60 points) TOTAL 0**

## EDUCATION STANDARDS

	maximum allowed
• Bachelor degree in public administration, accounting, finance or related field <b>OR</b> completion with a C grade or better of college or university courses related to treasury management (1 point per semester hour; 2/3 of a point per quarter hour)	50 points
• Associate degree in public administration, accounting, finance or related field	35 points
• Bachelor degree in an unrelated field	15 points
• Master's or Doctoral degree (5 points each)	10 points
• completion of an APT US&C public treasurers' institute (up to 50 points) <b>AND/OR</b> attendance at education programs <b>pre-approved</b> by APT US&C (assignment of points based on review of program agendas by the CPFA Certification Committee)	60 points
• treasury-related education by non-APT statewide or province-wide organizations (1 point per 4 hours of instruction)	10 points

### ASSOCIATE, BACHELOR, MASTER'S OR DOCTORAL DEGREE:

(copy of transcript must be attached to earn points)

degree \_\_\_\_\_ major \_\_\_\_\_ points \_\_\_\_\_  
 college/university \_\_\_\_\_  
 location \_\_\_\_\_ date received \_\_\_\_\_

(Use additional sheet(s) as needed.)

### COLLEGE/UNIVERSITY COURSES RELATED TO TREASURY MANAGEMENT:

(copy of transcript must be attached to earn points)

course name and number \_\_\_\_\_ points \_\_\_\_\_  
 college/university \_\_\_\_\_  
 location \_\_\_\_\_  
 grade \_\_\_\_\_ credit hours \_\_\_\_\_

(Use additional sheet(s) as needed.)

### PUBLIC TREASURERS' INSTITUTE OR OTHER EDUCATION PROGRAMS:

(attach proof of course completion)

sponsored by \_\_\_\_\_ points \_\_\_\_\_  
 conducted by \_\_\_\_\_  
 course dates \_\_\_\_\_ date of completion \_\_\_\_\_  
 course dates \_\_\_\_\_ date of completion \_\_\_\_\_  
 course dates \_\_\_\_\_ date of completion \_\_\_\_\_  
 course dates \_\_\_\_\_ date of completion \_\_\_\_\_

(Use additional sheet(s) as needed.)

**TOTAL EDUCATION POINTS (minimum 40 points/maximum 60 points)**      TOTAL      0 0

## SUMMARY

<b>TOTAL EXPERIENCE POINTS</b> (minimum 40 points/maximum 60 points)	0
<b>TOTAL EDUCATION POINTS</b> (minimum 40 points/maximum 60 points)	+ 0
<b>TOTAL EXPERIENCE AND EDUCATION POINTS</b> (minimum 100 points)	<u>0</u>

