



2024 Annual APT US&C Point Tally Sheet

August 11-14 • Greenville, South Carolina

Speaker/Topic	Description	Class Hours	CPFA Points	ACPPFA Points	Points Earned
Monday, August 12 10:00-11:00 pm Be Unstoppable! Keynote Speaker Alex Weber	What would you do if you were UNSTOPPABLE? Who might you become? What could you achieve? As an American Ninja Warrior, award-winning host for NBC, acclaimed author, and US Lacrosse Coach of the Year, Alex has reached record-breaking achievements as a leader and peak performer. But with these accomplishments, he's also faced intense pressure, hard failures, and his own limitations. Alex will share his system of being UNSTOPPABLE so you can keep going, growing, and getting better. Learn methods to help you accomplish the goals that matter the most at work, in relationships, and in life!	1.0	.5		
Monday, August 12 11:15-12:30 pm Affordable Housing Challenges and Opportunities City of Greenville Panel Bryan Brown, Racquel Collier, Patricia Dennis and Ginny Stroud	Greenville, South Carolina has found many partners willing to work together to solve their affordable housing shortage. This presentation will provide a toolbox of ideas and proven strategies to help you encourage and drive affordable housing development in your community, including identifying the need, useful partnerships between public and private organizations, and inventive funding ideas.	1.25	.625		
CONCURRENT SESSION Monday, August 12 1:30-2:30 pm Market Myths and Truths Jason Click and Mike Kloack Meeder Public Funds	This presentation will address the “myths” and “truths” as they relate to managing fixed income operating funds and other funds such as ARPA and capital projects. Topics include market timing in all rate environments, optimal portfolio structures, strategies, and type of investments based upon your cash flow parameters and risk preferences. The session will also demonstrate why cash flow modeling helps achieve the objective of safety, liquidity, and a market rate of investment return.				
CONCURRENT SESSION Monday, August 12 1:30-2:30 pm A Unique Solution for Attracting and Retaining Employees Joel Babbitt, NPPFA	Municipalities and small government entities are facing staffing shortages with police, fire, public works, and office employees. The cost of healthcare in retirement is becoming more important to employees, but can be difficult to provide as a benefit. A Retirement Healthcare Funding Plan (RHFP) allows you to pay for those healthcare expenses completely tax free and can be used as a tool to help differentiate your district's compensation plan to help attract and retain employees. We'll explain how the RHFP works and help you determine if it's a good fit for your organization.	1.0	.5	1.0	
Monday, August 12 2:45-4:45 pm How to Use Artificial Intelligence in Treasury and Finance Anthony Moggio, Finance Director, City of Rochester, Michigan	A lot has been said about artificial intelligence (AI) and how it will impact our world. But AI is here now and you don't have to wait to get started. Learn how you can implement it to help your office become more effective and efficient. This session will provide a real-time demonstration on how to utilize AI models and a discussion on the types of treasury functions it can be used to accomplish, like cash forecasting, policy development, fraud detection, project support and more.	2.0	1.0	2.0	



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Tuesday, August 13 9:30-10:30 am Fraud in Local Government Beth Wood, CPA and Director of Rural Government Services	As North Carolina's State Auditor, our agency encountered many instances of fraud in our local governments; in both large and small organizations. This session will discuss a number cases, how the fraud was carried out and what could have been done to prevent the fraud.	1.0	.5	1.0	
CONCURRENT SESSION Tuesday, August 13 10:45-11:45 am Liability Driven Investing Solutions for Public Pensions Mica Owens, Hilltop Securities and Hector Negroni, Foundation Credit	In this session, attendees will learn how municipal bonds can increase returns, improve credit quality and diversify your portfolio.	1.0	.5	1.0	
CONCURRENT SESSION Tuesday, August 13 10:45-11:45 am GASB Updates Larry Finney, Greene Finney Cauley, LLP	It is a little quieter than usual at the moment, so we hope you enjoy the slower pace while it lasts. Let's not just talk about the newest GASBs and what they are working on, but what they do and how they do it. We are even going to have a moment of silence for a big anniversary.				
Tuesday, August 13 1:00-2:00 pm Unified Response – How Everyone Contributes to Emergency Management Jessica Stumpf, Greenville County, SC	Are you prepared for an emergency or disaster? We all have a role and responsibility in emergency management, both personally and professionally. This session will focus on what emergency management is, learning about potential hazards your community faces, building relationships, and planning considerations for treasurer's offices to maintain continuity of operations.	1.0	.5	1.0	
CONCURRENT SESSION Tuesday, August 13 2:15-3:15 pm Recent Trends in Banking Greg Prost, Robinson Capital Management	This session will explore the reasons behind the recent failures and downgrades of banks which are grappling with a new technology landscape driven by the interconnectedness of their depositors and clients. We will also discuss current and upcoming issues to consider, highlighting the increased scrutiny on institutions with high exposure to commercial real estate loans, particularly in the office sector.				
CONCURRENT SESSION Tuesday, August 13 2:15-3:15 pm The Evolving Landscape of Fraud Protection Sierre Lindgren, Paymerang	There were 493+ million ransomware attacks globally in 2022. In an era where cybercriminals lurk around every digital corner, protecting your business from payments fraud is paramount. This insightful presentation will expose the intricate web of deception used by fraudsters, including the menacing threats of Business Email Compromise (BEC) and Vendor Impersonation. Gain invaluable insights into the tactics employed by cybercriminals and discover battle-tested strategies to fortify your defenses. Challenge your assumptions, strengthen your security posture, and emerge empowered to defend your business against the shadows of cybercrime.	1.0	.5	1.0	



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Tuesday, August 13 3:30-4:30 pm Economic Update Charlie Dougherty, Wells Fargo	This presentation will give a global and national economic overview discussing the current political environment and its effect on policy and the economy.	1.0	.5	1.0	
Wednesday, August 14 9:30-10:30 am Cyber Threats and Security Cindy Starns, FBI	This presentation will highlight the FBI's role in fighting cybercrime and provide an overview of the most prevalent cyber threats and their impact. Case studies and examples of social engineering showing how attacks happen will be presented to highlight the benefits of best practices. Will also provide resources for learning more about common scams and cyber security.	1.0	.5	1.0	
Wednesday, August 14 10:45 am – 12:30 pm Creating More Capacity and Well Being Caleb Campbell, Closing Keynote Speaker	As we all face increased demands and fewer resources, instead of ever getting caught up, we just feel more tired. Caleb's mission is to help us unlock our courage by facing fears, embracing change, and staying authentic to make us stronger, even in our weakest moments. Far from offering clichéd "do better, be better" advice, Caleb skillfully guides his audience through discussions on courage, emotional intelligence, and heart-centered leadership. This presentation will provide a refreshing new perspective on leadership, guiding you to harness your own inner strength and redefine what it means to be a leader in today's world. You'll walk away with actionable tools and insights that empower you to lead with courage, purpose, and an open heart.	1.75	.875	1.75	
SEPARATE REGISTRATION IS REQUIRED Wednesday, August 14 1:00-6:00 pm Advanced CPFIM	Attendees must have already achieved their CPFIM certification. With a deep look into analysis and investment strategy, attendees will gain a more thorough knowledge of how to quantify an investment policy objective and the tools needed to achieve it. The ACPFIM training provides the confidence and knowledge to manage your investments more efficiently and effectively. This program requires a written exam and is only open to CPFIM graduates.				