Certified Public Funds Investment Manager Training

Tuesday, November 7, 2023

Exam on Wednesday November 8

Salt Lake City, Utah

What You'll Learn

The nationally recognized Certified Public Funds Investment Manager (CPFIM) certification program is designed to provide the confidence and knowledge to manage your investments better. The training covers the six modules listed below and requires a written test to demonstrate material retention and comprehension. Classroom time is about six hours. Graduates will receive a certificate upon completion and will be mailed a plaque recognizing their accomplishment.

Investment Instruments
Investment Options and Characteristics, Bond Lingo, and Your Investment Comfort Zone

Banks, Brokers, and Advisors
Where You Buy and Keep Investments, Due Diligence, Purchasing, Specific Investment Details

Governance & Your Investment Policy
The Investment Policy, Internal Controls, Developing Procedures

Safety, Liquidity, and Yield
Identifying and Mitigating Risks, Quantifying and Reporting Safety, Understanding Liquidity Needs, Yield Calculations

Cash Flow
Bank and Investment Accounts, Creating a Reserve Account, Determining How Much You Have to Invest, Cash Flow Forecasting

Your Strategy
Elements of a Good Strategy, Laddering, Barbell, Matching, Investment Choices

Register at www.APTUSC.org

Attend In Person or Online

This training will be offered in-person and as a livestreamed event on Tuesday, November 7 from 9:00 am - 4:00 pm MT. The required exam will be held the following day, Wednesday, November 8 at 9:00 am MT. Training cost is $299 for APT US&C members and $499 for non-members.

In-Person: the class will be held in the Summit Training Room on the 3rd Floor of the Boyer Building at 101 South 200 East in Salt Lake City, Utah.

Online attendees: you will receive a Zoom meeting link to attend the livestreamed session. Online attendees can interact via the chat or by unmuting yourself to ask a question. Start time is 11:00 am Eastern (10:00 Central, 9:00 Mountain, 8:00 Pacific).

Instructor

Jason Williams has over 20 years of capital markets experience with trading, sales, and fixed income markets. As the President of Moreton Asset Management, he is responsible for portfolio management, operations oversight, sales, and client relations.

Prior to joining Moreton Asset Management where he has served as president for 11 years, Jason was a senior portfolio manager with Contango Capital Advisors Fixed-Income Team, portfolio manager at Zions Bank Liquid Asset Management, and a senior financial representative with Fidelity Investments.

Jason earned his B.A. in Political Science and Economics from Brigham Young University, and an MBA in finance from the University of New Hampshire. He resides in Farmington, Utah.