

Managing Your Investments

Certified Public Funds Investment Manager Training

Wednesday, September 11, 2024 (10:00 am - 4:00 pm)

Exam on Thursday September 12 (8:30 am - 10:30 am)
Nolte Gateway Center, Casper College (Casper, Wyoming)

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 Today!

Don't miss this training during the WAMCAT Institute this September. **Add this session to maximize your learning for the week.** Register as a standalone class or as a two day session on Wednesday and Thursday that includes the CPFIM class, awards luncheon, and Thursday afternoon sessions on Ethics in Public Service and Cyber Resiliency Essentials.

Training cost for WAMCAT members for the standalone CPFIM is \$325 (#20778) and \$435 for the full Wednesday-Thursday option (#20779). Wednesday session is from 10:00 am to 4:00 pm and Thursday full day is 8:30 am - 5:00 pm. The sessions will be held in the Nolte Gateway Center at Casper College at 125 College Drive, Casper, Wyoming.

[Register online here.](#)

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, 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.

Register online or contact us for more info

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