



Association of Public Treasurers of the United States and Canada

Advanced Certified Public Finance Administrator (ACPFA) Application Information

The Advanced CPFA rewards CPFA holders for a commitment to advanced educational topics offered by the APT US&C and its state and province associations.

The Advanced CPFA is designed to encourage and reward advanced education as well as participation in the APT US&C and its state and province associations to help strengthen our entire treasury community. Applicants must:

- Have a current CPFA at the time of application for the Advanced CPFA.
- Be an active APT US&C member.
- Demonstrate 15 experience points and 45 advanced education points.

The ACPFA accreditation expires after five years.

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

1. 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 finance activities.
2. Maintained continuous Active Membership (see APT US&C's Bylaws for definition):
 - a. For each of the years since their last CPFA certification; and
 - b. At the time of approval.
3. Believe in and practice APT US&C's Code of Ethics.
4. 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.
5. ACPFA applicants must demonstrate a total of 60 points: 15 experience points and 45 "advanced" education points. Advanced points are determined by review of the training course descriptions completed by the CPFA Chair. All points must be earned since the last CPFA certification with supporting documentation submitted with the application.
6. Submit a non-refundable fee of two hundred dollars (\$200). The application fee will be waived for the second submission if the first attempt at certification is unsuccessful. The fee includes application processing and certification award.

To receive recognition at the APT US&C Annual Conference, the application deadline is June 1; however, applications are accepted any time throughout the year.

Note: 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 to info@aptusc.org within thirty (30) days of notification of the Committee's decision. 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. If final determination is that the application is not approved, the applicant will be given one-year to re-submit without an additional application fee, to earn the required points for reconsideration.



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Experience Points

All points must be earned since last certification	Points Earned
Attendance at an APT US&C Annual Conference	5 per year
Attendance at an APT US&C Affiliate Annual Conference (determined as where the annual election/membership meeting is held)*	2 per year
Service as a committee member for APT US&C or an Affiliate association*	1 per year
Service as a committee chair for APT US&C or an Affiliate association*	2 per year
Service as a director or parliamentarian of APT US&C or an Affiliate association*	3 per year
Service as an officer of APT US&C or an Affiliate Association*	4 per year
Service as a mentor in an APT US&C Affiliate Association Mentor Program	1 per year
<ul style="list-style-type: none"> Complete a recognized national professional achievement certification program related to treasury management (e.g., CPFIM, ACPFIM, CCM, CGFM, CPA, CPFO, CMA) 	5 per certification
<ul style="list-style-type: none"> Recipient of a special award presented by APT US&C or an Affiliate Association* 	5 per award
* Applicants that do not have an APT Affiliate Association may substitute points from one statewide or province-wide organization relating to treasury management.	

Education Points

All points must be earned since last certification	Points Earned
Masters or Doctoral degree	40
Bachelor degree in public administration, accounting, finance or related field	25
Associate degree in public administration, accounting, finance, or related field	15
Bachelor degree in an unrelated field	15
Completion with a C grade or better of college or university courses related to treasury management (one point per semester hour)	25
Attend an APT US&C approved Advanced Education Program (approval and points contingent on review of program agendas by the CPFA certification chair/committee.	1 point per hour of instruction
Take the APT US&C Advanced CPFIM Certification Training; Take the ACPFIM Re-certification Training	5 / 3
Present at an APT US&C Annual Conference, or other educational sessions, including virtual trainings, sponsored by APT US&C or an Affiliate Association.	2 points per hour of instruction
Write an APT US&C training manual	25 points per manual
Assist with revisions/re-writes of APT US&C training manuals	10 points per manual
Write and publish an article related to treasury management for the APT US&C or affiliate association newsletter/website <ul style="list-style-type: none"> 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

ACPFA applicants must demonstrate a total of 60 points: 15 experience points and 45 advanced education points. All points must be earned since the last CPFA certification with supporting documentation submitted with the application.



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Advanced Certified Public Finance Administrator (ACPFA) Application

Fill out this form to upload with your application, along with documentation as specified.

Experience

APT US&C Annual Conference or Affiliate Annual Conference. Include proof of attendance.

Year _____	Host _____	Training _____	Points _____
Year _____	Host _____	Training _____	Points _____
Year _____	Host _____	Training _____	Points _____
Year _____	Host _____	Training _____	Points _____
Year _____	Host _____	Training _____	Points _____
Year _____	Host _____	Training _____	Points _____

Committee Member/Menor/Chair or Director/Officer. Include proof of service.

Year _____	Association _____	Position _____	Points _____
Year _____	Association _____	Position _____	Points _____
Year _____	Association _____	Position _____	Points _____
Year _____	Association _____	Position _____	Points _____
Year _____	Association _____	Position _____	Points _____

APT US&C or other National **Professional Certification** related to treasury management (e.g., CPFIM, ACPFIM, CCM, CGFM, CPA, CPGO, CFE, CIA, CMA) (5 pts for initial; 3 pts for re-certification). Include proof of accreditation.

Certification _____	Sponsor _____	Year Earned _____
Certification _____	Sponsor _____	Year Earned _____
Certification _____	Sponsor _____	Year Earned _____

APT US&C or Affiliate Association **Special Award Recognition** (5 pts per award). Include proof of award.

Year _____	Association _____	Award _____
Year _____	Association _____	Award _____

TOTAL EXPERIENCE POINTS (15 required) _____



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EDUCATION

Associate, Bachelor, Master's or Doctoral Degree. Include all transcripts.

Degree _____ Major _____ Date Received _____

College/University _____ Location _____

Total Degree Points: _____

College/University Treasury Management Courses. Include all transcripts.

Course Name/Number _____ Grade _____ Credit Hours _____

Date Completed _____ College/University _____ Location _____

Course Name/Number _____ Grade _____ Credit Hours _____

Date Completed _____ College/University _____ Location _____

Course Name/Number _____ Grade _____ Credit Hours _____

Date Completed _____ College/University _____ Location _____

Total Treasury Management Courses Points: _____

APT US&C or Affiliate **Annual Conference**; APT US&C Affiliate **Institute Training** or other treasury related "advanced" training programs (in person or virtual). Include proof of attendance and hours of attendance and training program descriptions. (1 point for every 1 hour of education; or non-APT/ Affiliate: 1 point for every 2 hours of education)

Training _____ Host _____

Training Date(s): _____ Location _____ Points _____

Training _____ Host _____

Training Date(s): _____ Location _____ Points _____

Training _____ Host _____

Training Date(s): _____ Location _____ Points _____

Training _____ Host _____

Training Date(s): _____ Location _____ Points _____

Total Institute/Education Program Points: _____



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Manual or Article. Include proof of publication.

Title of Article and Publication _____

Sponsor Organization _____

Date of Publication _____ Number of Words in Article _____

Title of Article and Publication _____

Sponsor Organization _____

Date of Publication _____ Number of Words in Article _____

Total Manual/Article Points: _____

Presenting at a Conference or Education Session: Include proof of presentation.

Title/Topic of Presentation _____

Sponsor Organization _____

Date of Presentation _____ Length of Presentation _____

Title/Topic of Presentation _____

Sponsor Organization _____

Date of Presentation _____ Length of Presentation _____

Total Presentation Points: _____

TOTAL ADVANCED EDUCATION POINTS (45 required) _____

Summary

Total Experience Points _____

Total Education Points _____

TOTAL POINTS (minimum of 60) _____