

## Ohio Treasurer's Cincinnati CPIM Academy Course Description Quick Guide

Course Name	Course Description
<b>Registration and Breakfast</b>	
<b>General Session and Market Update-Room 111</b> Jonathan Azoff, Director of Debt Management & Senior Counsel, Ohio Treasurer of State, Jim McCourt, Portfolio Manager, Meeder Investment Management, Jennifer C. Trowbridge, CFA, Managing Principal & Portfolio Manager, RedTree Investment Group, Ted Sumnar, Senior VP and Managing Director, Institutional Investments, Huntington Capital Markets	<p>This panel discussion will provide a current market update and share with participants how these market developments may impact every day job duties. Topics will include interest rates as they relate to STAR Ohio, STAR Plus, and general deposits. Additional discussion will cover world news and events, various federal data points, preparing for regulatory reform, and asset allocation tips. The course will conclude with an overview of the Ohio Market Access Program (OMAP), a credit enhancement program for municipal notes offered by the Treasurer's Office.</p>
<b>ETH 228: The Ohio Ethics Law - Upholding Trust in Government-Room 110</b> Susan Willeke, Education & Communications Administrator, Ohio Ethics Commission	<p>This lively and interactive session explores recent issues and updates regarding the Ohio Ethics Law. Join us for a discussion on the latest in conflicts of interest, public contracts and more!</p>
<b>ETH 228: The Ohio Ethics Law - Upholding Trust in Government (2)-Room 110</b> Susan Willeke, Education & Communications Administrator, Ohio Ethics Commission	<p>This lively and interactive session explores recent issues and updates regarding the Ohio Ethics Law. Join us for a discussion on the latest in conflicts of interest, public contracts and more!</p>
<b>OPCS Training-Room 109</b> Zach Prouty, Legislative Liaison, Treasurer of State, Patrick Castleman, Compliance Analyst 2- Trust Department, Treasurer of State	<p>This discussion will provide an overview of the Ohio Pooled Collateral Program. It will include the benefits of the program, details on how to effectively use the program, and a live demonstration of the system.</p>
<b>General Session: Cyber Fraud-Room 111</b> Dusten Kohlhorst, Director of IT Services, Ohio Treasurer of State, Stacey Russell, Fiscal Officer, Muskingum County Library System	<p>Over view of cyber security</p>
<b>Lunch</b>	

<p><b>Current Trends in Public Finance-Room 107/108</b></p> <p>Andrew Laskey, Vice President, RBC Capital Markets, Eileen Stanic, CTP, Senior Public Funds Advisor, Meeder Investment Group</p>	<p>This session will take a look at how current economic and market conditions impact your debt issuance.</p>
<p><b>Panel Discussion: Financial Technology Trends (Digital Transformation, Blockchain Technologies)-Room 111</b></p> <p>Dusten Kohlhorst, Director of IT Services, Ohio Treasurer of State, Anthony Dean, Lead Engineer, Safechain, Doug McCollough, Chief Information Officer, City of Dublin, Tom Walsh, Senior Vice President, PNC Bank</p>	<p>This panel discussion will be a basic level overview of what Blockchain is and how local government can use this new technology.</p>
<p><b>INV 357 Investing in Today's Interest Rate Environment-Room 107/108</b></p> <p>Jim McCourt, Portfolio Manager, Meeder Investment Management, Eileen Stanic, CTP, Senior Public Funds Advisor, Meeder Investment Group</p>	<p>This class will provide strategists to make the most of their portfolio given the current rate environment.</p>
<p><b>TOS Programs Update-Room 110</b></p> <p>James Bernholtz, Economic Development Officer, Treasurer of State, Lisa Eisenberg, Deputy Director of Debt Management, Ohio Treasurer of State</p>	<p>An overview of programs administered by the Treasurer of State's office. Including, OMAP, Linked Deposits, and STABLE.</p>
<p><b>FIN 348 Tax Exempt Financing-Room 107/108</b></p> <p>Diana Vicen, Senior Associate Attorney, Dinsmore &amp; Shohl LLP, Eric Prall, Investment Banker and financial advisor to municipal issuers., Hilltop Securities Inc</p>	<p>This class will take an advanced look at your options for issuing tax-exempt debt</p>
<p><b>INV 106: Basics of Investing-Room 105</b></p> <p>Jennifer C. Trowbridge, CFA, Managing Principal &amp; Portfolio Manager, RedTree Investment Group</p>	<p>This course will provide you with the foundation to develop a proper investment program. Ohio investment law is very specific as to what you can and cannot do. Topics to be discussed will include a history of Ohio investment law, developing an investment policy, eligible investments and the role of vendors.</p>
<p><b>ACC 210 Effective Internal Controls, Policies and Procedures-Room 109</b></p> <p>Loren S. Crisp, Chief Auditor, SW Region, Auditor of State</p>	<p>An overview of internal controls that you should have in place in your office. Presented by the Ohio Auditor of State's Office.</p>