

Ohio Treasurer's Cincinnati CPIM Academy

Full Event Schedule

Thursday, September 12, 2019

Room 105

Room 108

Room 109

Room 110

Room 111

7:30 AM - 8:30 AM

Registration and Breakfast

8:30 AM - 9:20 AM

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General Session and Market Update-Room 111
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

9:30 AM - 10:20 AM

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INV 357 Investing in Today's Interest Rate Environment-Room 107/108
Jim McCourt, Portfolio Manager, Meeder Investment Management, Eileen Stanic, CTP, Senior Public Funds Advisor, Meeder Investment Group

OPCS Training-Room 109
Zach Prouty, Legislative Liaison, Treasurer of State, Patrick Castleman, Compliance Analyst 2- Trust Department, Treasurer of State

ETH 228: The Ohio Ethics Law - Upholding Trust in Government-Room 110
Susan Willeke, Education & Communications Administrator, Ohio Ethics Commission

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10:30 AM - 11:20 AM

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Current Trends in Public Finance-Room 107/108
Andrew Laskey, Vice President, RBC Capital Markets, Eileen Stanic, CTP, Senior Public Funds Advisor, Meeder Investment Group

ACC 210 Effective Internal Controls, Policies and Procedures-Room 109
Loren S. Crisp, Chief Auditor, SW Region, Auditor of State

ETH 228: The Ohio Ethics Law - Upholding Trust in Government (2)-Room 110
Susan Willeke, Education & Communications Administrator, Ohio Ethics Commission

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11:30 AM - 12:20 PM	INV 106: Basics of Investing-Room 105 Jennifer C. Trowbridge, CFA, Managing Principal & Portfolio Manager, RedTree Investment Group	FIN 348 Tax Exempt Financing-Room 107/108 Diana Vicen, Senior Associate Attorney, Dinsmore & Shohl LLP, Eric Prall, Investment Banker and financial advisor to municipal issuers., Hilltop Securities Inc	xxx	TOS Programs Update-Room 110 James Bernholtz, Economic Development Officer, Treasurer of State, Lisa Eisenberg, Deputy Director of Debt Management, Ohio Treasurer of State	xxx
12:20 PM - 1:20 PM	Lunch				
1:20 PM - 2:10 PM	xxx	xxx	xxx	xxx	General Session: Cyber Fraud-Room 111 Dusten Kohlhorst, Director of IT Services, Ohio Treasurer of State, Stacey Russell, Fiscal Officer, Muskingum County Library System
2:20 PM - 3:10 PM	xxx	xxx	xxx	xxx	Panel Discussion: Financial Technology Trends (Digital Transformation, Blockchain Technologies)-Room 111 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