



# 2020 Winter Workshop

January 16-17 – Crowne Plaza West, Lansing, Michigan

## CPFA/ACPFA/MiCPT POINT TALLY SHEET

CPFA - Certified Public Finance Administrator; ACPFA – Advanced Certified Public Finance Administrator;  
MiCPT - Michigan Certified Professional Treasurer

*Use this sheet to keep track of education points earned at the 2020 Winter Workshop.  
There are a possible 5.25 CPFA points, 2.25 ACPFA points and 5.25 MiCPT points for this event.*

Instruction Time	Topic	Speaker	CPFA Points	ACPFA Points	MiCPT Points
Thurs., Jan 16 1:00-5:00 pm	<b>BS&amp;A Software Training</b> This specialized training will focus on the tax module: report writing, tax collection, tips and tricks and specific answers and support on attendee questions.	Brad Russman, Tax Specialist, BS&A	2.0		2.0
Fri., Jan 17 8:15-9:15 am	<b>Internal Controls with Limited Resources</b> Best practices in internal controls and their importance in effectively managing and operating the treasurer's office. Dive deeper into how to achieve best practices when dealing with limited resources; solutions on the challenges of cash handling at off-site locations and special events.	Keith Szymanski, CPA Chris Gilbert, CPA Plante Morane	.5	1.0	.5
Fri., Jan 17 9:30-10:30 am	<b>From Distracted to Productive: Finding Your Productivity and Focus in a Hyper-Interrupted E-World</b> E-mail. Texts. Interruptions. Project Transitions. Office Clutter. Social and Other Media. Your Smart Phones and Tablets. Even Family and Friends.	Keynote Speaker Randall Dean Email Sanity Expert	.5		.5
Fri., Jan 17 10:45 am-Noon	<b>Preparing for an Audit</b> Receive great insight on how to prepare for an audit in order to make the process easier for yourself, your staff and the municipality.	Bill Tucker, CPF and Pat Clifford, Manager Maner Costerisan, CPA	.625		.625
Fri., Jan 17 1:00-1:30 pm	<b>Michigan Dept. of Treasury Update</b> What is happening in Treasury for 2020	Rachael Eubanks, State Treasurer, Michigan Department of Treasury	.25		.25
Fri., Jan 17 1:30-2:45 pm	<b>Working with Title Companies and Disabled Veterans Exemption Process</b> Learn how to work with title companies during the title and closing process and the procedures they must follow regarding taxes and assessments. Information will also be shared on the Disabled Veterans Tax Exemption, how to determine taxes on veteran home purchases and sales, and the adjustment process in the BS&A software system.	Mark Marker John Apostol Vanguard Title Company  Laurie Sheldon, Treasurer City of Kentwood	.625	1.25	.625
Fri., Jan 17 3:00-4:30 pm	<b>Legislative Update</b> Learn the latest from "behind the scenes" on what is happening with Michigan legislation and its impact on municipalities and treasury offices.	Judy Allen, MTA Chris Hackbarth, MML	.75		.75