CPIM

CENTER FOR PUBLIC INVESTMENT MANAGEMENT

A PROGRAM BROUGHT TO YOU BY:

JOSH MANDEL

STATE TREASURER OF OHIO

Center for Public Investment Management (CPIM)

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WHAT IS CPIM?

The Center for Public Investment Management (CPIM) is a continuing education program for Ohio's public funds managers, pursuant to Ohio Revised Code 135.22 and 321.46. CPIM's goal is to provide continuing education for public funds managers in the areas of finance, investments, cash management (including debt issuance and management), and ethics. The Treasurer's office is also making it a priority to expand our online advanced course library. Check out our new course offerings on the Treasurer's website.

WHO MUST COMPLETE CONTINUING EDUCATION?

R.C. 135.22 provides that **all treasurers** (any person whose duties include making investment decisions with respect to the investment or deposit of interim monies) complete at least 6 hours of continuing education annually. This does not apply to county treasurers.

R.C. 321.46 provides that **county treasurers** must complete at least 12 hours of continuing education biennially from the Treasurer of State's office and the Auditor of State's office. A **newly elected treasurer** must complete 13 hours of education approved by the Ohio Auditor of State on governmental accounting, portfolio reporting and compliance, and an additional 13 hours approved by the Ohio Treasurer of State on investments and cash management.

HOW CAN I OBTAIN THE REQUIRED STATUTORY CONTINUING EDUCATION CREDITS?

- **Attend a CPIM Conference.** Annual conferences are held statewide.
- **Attend an accredited course.** CPIM accredits external educational workshops and trainings sponsored by professional associations.
- **Complete an online CPIM course.** CPIM offers continuing education credits through online courses for public funds managers having four years or more experience.

ARE THERE ANY FEES?

Attendee/Participant:	Fee Includes:	Cost:
All Public Funds Managers (Required Training by R.C. 135.22/321.46)	Annual Fee Includes: Certification; Unlimited Access to CPIM Conferences & Online Courses	$100
Non-Certification Attendees	CPIM Conference	$100
Non-Certification Attendees	CPIM Online Course	$25

WHO QUALIFIES FOR AN EXEMPTION FROM CONTINUING EDUCATION?

For questions regarding exemption eligibility, contact your legal advisor, city attorney, and/or county prosecutor for a legal opinion. The Annual Notice of Exemption form may be obtained online at www.ohiotreasurer.gov/CPIMhome or by calling (614) 728-4236. Exemption forms must be submitted on an annual basis.

WE WELCOME YOUR QUESTIONS AND FEEDBACK!

Please contact our office if you have any questions about government or need constituent assistance. We also want to know your thoughts and feedback on ways to improve CPIM.

To obtain your Continuing Education Report or for more information go to www.ohiotreasurer.gov/CPIMhome, email cpim@tos.ohio.gov, or call (800) 228-1102, option # 2.