



Overview of GFOA's New Best Practices

Group Internet-based course

NEW

April 20, 2017, and again on November 9, 2017

2:00 p.m. – 4:00 p.m. ET

Course Level: Basic • Prerequisite: None

Field of Study: Management Services

**2 CPE
CREDITS**

Who Will Benefit

Financial officers interested in understanding new and revised Best Practices in public financial management.

Program Overview

This course will focus on GFOA's Executive Board recently approved five best practices in the areas of treasury and investment management, retirement and benefits, and municipal debt. GFOA best practices identify specific policies and procedures that contribute to improved government management. They aim to promote and facilitate positive change rather than merely to codify current accepted practice. GFOA has emphasized that these practices be proactive steps that a government should be taking. Best practices are applicable to all governments (both large and small), are approved by GFOA's Executive Board, and represent the official position of the organization.

Seminar Objectives

Those who successfully complete this seminar should be able to:

- Apply the best practices described in each best practice including:
 - *Procurement of Financial Services*, recommends that governments review their financial services contracts every five years and use a competitive process for the procurement of financial services.
 - *Investment Program for Public Funds*, recommends that all governments establish a public funds investment program by completing several steps: developing an investment leadership team, identifying the funds being invested and their cash flow characteristics, reviewing all applicable laws and regulations, establishing a risk profile, determining the portfolio management team, and creating an investment policy.
 - *Defined Contribution Retirement Plan Design*, clarifies and updates the design elements governments should include if they choose to provide a defined contribution (DC) plan as a primary retirement vehicle. These include analysis to determine the cost of providing the benefit and determining whether employees are eligible for a federal insurance program that provides benefits to retired people (e.g., Social Security).
 - *Electronic Payments*, recommends that governments use electronic payments for all payments.
 - *Refunding Municipal Bonds*, recommends that issuers include guidelines in their debt management policies that address preservation of future refunding flexibility. Issuers should also analyze their refunding objectives, the efficiency of any related escrow, and the unique aspects of executing the refunding transaction.

Instructors

Kenton Tsoodle, Vice Chair Debt Committee and Assistant Finance Director, Oklahoma City, Oklahoma

Barry Faison, Vice Chair CORBA, CFO Virginia Retirement System

It's Easy to Participate

- The GFOA's Internet training is delivered to attendees via a secure website and audio conferencing service.

Equipment Needed

- A computer with a Web browser to view the presentation. If you have speakers for your computer, you will be able to listen to the training using them.
- If you do not have speakers for your computer, you will need a phone to listen to the presentation. (Speaker phone recommended, but not required.)

How It Works

- Participants will receive an e-mail invitation containing a link with instructions at the beginning of the week the course will be taking place from the e-mail address messenger@webex.com. (Please add this e-mail address to your "allowed senders list.")
- Materials can be viewed on a secure Internet site.
- Questions can be asked at any time during the course, and interactive exercises will test your mastery of the material.
- To join the event more quickly, you can set up Event Manager before the event starts. Go to: <https://gfoa.webex.com/gfoa/ecsetup.php?frommail=1>.

To learn more or register for this event, visit www.gfoa.org.



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Program Information (Please Check One)

April 20, 2017 **November 9, 2017**

Please print or type (or register online at www.gfoa.org)

Check here if you are faxing this form. Fax accepted only with credit card payment or purchase orders. **If faxing, do not mail the original.**

Name: _____

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GFOA Membership # (if available) _____

Check box to indicate if you are substituting for an active member.

Active Member #: _____

Active Member Name: _____

Please photocopy this form for additional registrants.

A copy of the confirmation and invoice will be sent as a PDF attachment via e-mail from training@gfoa.org. Please add this address to your allowed senders list.

Registration fee is per person, not per group. Early and/or student registration discounts do not apply to Internet training.

Register and pay for 3-9 participants and receive 10 percent off the total cost of the registrations. Register and pay for 10 or more participants and receive 15 percent off the total cost of the registrations. To qualify for the group discount, registrations must be submitted together. Individual registrations submitted separately or after the original group is submitted will not qualify for the group discounts.

The GFOA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.



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Cancellation requests must be made in writing to the GFOA. All cancellations received five business days before the event date will incur a \$20 administrative fee. No refunds will be issued after that date.

Substitutions (government entities only): A one-for-one substitution of a nonmember for an active member is allowed. If your organization has a current GFOA member on staff who is not participating in these training seminars, a nonmember may attend in his/her place at the member rate. You must provide the member number and/or name of the GFOA member on the registration form.

Inquiries: For information regarding administrative policies such as complaints and refunds, please contact the GFOA at training@gfoa.org or at 312-977-9700.

Registration Fees (Please Check One)

\$85 Active/Associate Member \$160 Nonmember

Registration Fee \$ _____

Group Discount \$ _____

New member fee: Visit www.gfoa.org \$ _____
or call GFOA at (312) 977-9700 for fee

Discount for paid new member (\$25.00) \$ _____

REGISTRATION TOTAL \$ _____

Payment Information (Please Check One)

Fees must be paid in U.S. dollars by check, credit card, or purchase order.

Please do not submit duplicate copies of this form.

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Make check payable to "Government Finance Officers Association"
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Payment by credit card: scan and e-mail this form to training@gfoa.org; fax: 312-977-4806; or send to:

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