



**2014-2015 Officers**

**PRESIDENT**

**Susan Balls, CPFA**  
P O Box 489  
Hyde Park, UT 84318  
(435) 563-6507

**PRESIDENT ELECT**

**Stephen R. Elms, CPFA**  
12830 S. 1700 W.  
Riverton, UT 84065-6661  
(801) 208-3166

**VICE PRESIDENT**

**SECRETARY**

**Tyler Jacobson**  
40 South Main  
Spanish Fork, UT 84660  
(801) 804-4508

**TREASURER**

**Judy Schiers, CPFA, CPFIM**  
5 S. Main Street  
Parowan, UT 84761  
(435) 477-3331

**DIRECTORS (1 Year)**

**Susan Moses, CPFA**  
PO Box 668  
Kamas, UT 84036  
(435) 783-6236

**Cecilia Johnson, CPFA,**

**CPFIM**  
56, U 143  
Brian Head, UT 84719  
435-677-2029 X 103

**DIRECTORS (2 Year)**

**Laure Moore**  
P.O. Box 1085  
Morgan UT 84050  
801-829-3461

**Debbie Elms**

137 N. Commerce Dr.  
Saratoga Springs, UT 84045  
801-766-9793

**CO-EDUCATION**

**DIRECTORS**

**Jolene Jackson, CPFA**  
250 North Main  
Centerville, UT 84014  
(801) 295-3477

**Sharri Oyler, CPFA**

102 S. Tremont Street  
Tremonton, UT 84337  
435-257-2626

**IMMEDIATE PAST PRESIDENT**

**Jody Thomas, CPFA**

76 North 200 West  
Delta, UT 84624  
435-864-2759

**CO-EXECUTIVE**

**DIRECTORS**

**Wendy C. Bonzo, CPFIM**  
10 North Main  
Cedar City, UT 84720  
(435) 865-5105

**Doris Weight, CPFA**

110 S Main  
Springville UT 84663  
(801) 489-2702

# Money Talks

VOLUME 7 ISSUE 2

MARCH 2015

## Message From Our President



### Fellow Treasurers

This year’s theme of “enjoy the ride” has continued to be an inspiration to me. While my husband was competing in the Logan to Jackson 206 mile bike race, I had amazing support from my kids. They helped me to have one of the best days of my life; even when Alan was 3 hours late coming into Afton, Wyoming and we didn’t know where he was. I tend to be the anxious type, but with their help I was able to relax and enjoy the day.

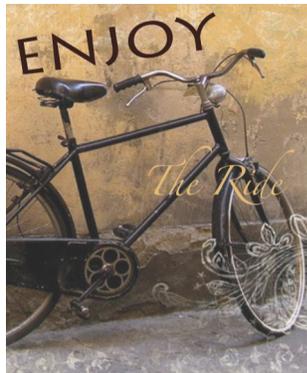
We had a great time supporting him and encouraging other riders along the entire course with our cowbells and handmade signs which included funny phrases like,

**“My husband is crazy hott in spandex”, “Nice Bum, where U from”, and “Smile if your Bum hurts”.**

We had a lot of fun comments and even more smiles from riders, during the race.

That evening after he had completed the race – which was unfortunately 5 minutes after they closed the finish line – we were hungry. We ran over to get a quick bite to eat. I was standing in line waiting to order. A lady came up to me and said, “I just want to thank you for your encouragement up the Snake River Canyon. You are the best Cheerleader. Your signs and your cheering helped me to make it the rest of the way.” While I was trying to ‘enjoy the ride’, I was helping someone else complete her ride.

Hopefully we are looking around us to see what we can do to help our fellow



treasurers find success in their careers and boost them along. I must give a shout out to my incredible board. They have made my job much easier. They have supported me and helped me along the way. The future of this Association is in great hands.

We hope you are planning on attending our Spring Conference. This year the dates are May 13 – 15, and like last year it will be at the Abbey Inn in St. George. We have some incredible classes planned. I am so excited about this conference. We have wonderful training opportunities that I have detailed in this newsletter. I hope to see you there. And, I hope you continue to “Enjoy the Ride”!

Susan

*2015 UAPT Annual Conference  
May 13th to 15th - Abbey Inn - St. George*



It's our favorite time of year again, Spring Conference time! This year we are a little later which "should" mean better pool time, better golf time and even better shopping time, (all done before or after class of course). Here is a sample of what you can expect.

### **TRAINING OPPORTUNITIES**

**CPFIM:** The UAPT is proud to offer you the opportunity to receive your designation as a Certified Public Funds Investment Manager (CPFIM).

Normally this training is offered exclusively at the National APT US&C conference but the UAPT has contracted to have an accredited instructor come to the Abbey Inn in St. George to teach the class on Tuesday, May 12, 2015 from 8 AM - 4 PM and to administer the examination on Wednesday, May 13, 2015 from 7:30 AM - 9 AM.

**How do I become a CPFIM?** You must attend a class which is taught by an accredited instructor and then pass an exam.

**Can I receive my CPFIM accreditation in only one day?** Yes, you can as long you attend the class and pass the exam.

**What concepts and principals will I learn by taking this course?** Financial officers and public entities, in general, have minimal training in the arena of fixed income investing. Often times they are left to the guidance and expertise of the bank or brokerage who is selling them their investments. While most banks and brokerages offer good advice and have become trusted allies in your investing concerns, having the CPFIM accreditation gives you the confidence and the knowledge to manage your investments better.

**How much is it to attend this class and take the exam?** \$150

**Why would I want to become a CPFIM?**

1. **Recognition** - you will receive a plaque showing that you are a CPFIM
2. **Accreditation** - You can proudly display the initials "CPFIM" after your name to indicate your accreditation to other business associates and professionals.
3. **Professionalism** - By enrolling in the CPFIM program and obtaining the accreditation, you are demonstrating to your community and your employer that you are a qualified investment manager.

Please note this course is not included in the cost of your 2015 UAPT Spring Conference Registration. There is an additional cost of \$175 to participate in this course.

For more information please visit <http://www.aptusc.org/accreditations/cpfim>

**CASH HANDLING:** Mark McRae, Public Treasury Institute Trainer, will present the Cash Handling Certification as a part of our conference. You will receive the certification at the conference. Our board has agreed to purchase your manuals for you; so the cost of this training will be included in the cost of the conference. (This is a savings of \$60 to your community.)

**OTHER TOPICS:** We will also cover IRS 1094 forms (ACA), PCI Compliance, Chip and Pin compliance for new credit cards, Life-Family-Work Balance, along with Crime Insurance and Treasurer Bonds.

### HUMAN BEHAVIOR 101

We are excited to have scheduled Kim Giles, President and Founder of Clarity Point Coaching, to speak to us at our Spring Conference. Kim is sought after as a speaker and executive life coach. She is a frequent guest on national TV and radio and a regular contributor to KSL TV and BYU radio. Her class will help you gain clarity about human behavior, eliminate office drama and overcome the fear of failure that holds you back.

In connection with this, Kim invites you to go to her website and take the "Fear Assessment". The web address to take the "Fear Assessment" is <http://a.claritypointcoaching.com/>. It will ask for some brief information about you. In the occupation field, please put "assoc of treasurers". This will help them identify you as a part of our group. When you get your assessment back, print a copy and bring it to the conference with you. During her class, we will evaluate our results.



### THURSDAY EVENING ENTERTAINMENT



Brad Bonar, Jr is a double treat! One of the most talented close-up magicians in the country, he is also a very gifted and funny stand-up comedian.

His wealth of material springs from his observations of family life, (Brad has four children). Brad's comedy is universal in its appeal, and along with the magic displayed in his show, he has become a favorite at every event he hosts.

In the first minute of Brad's act... you will stare at him like a deer in headlights out of sheer amazement, and then just as fast... he turns it around and you're laughing so hard your face hurts. This is the real magic of Brad Bonar, Jr. You won't want to miss this event.

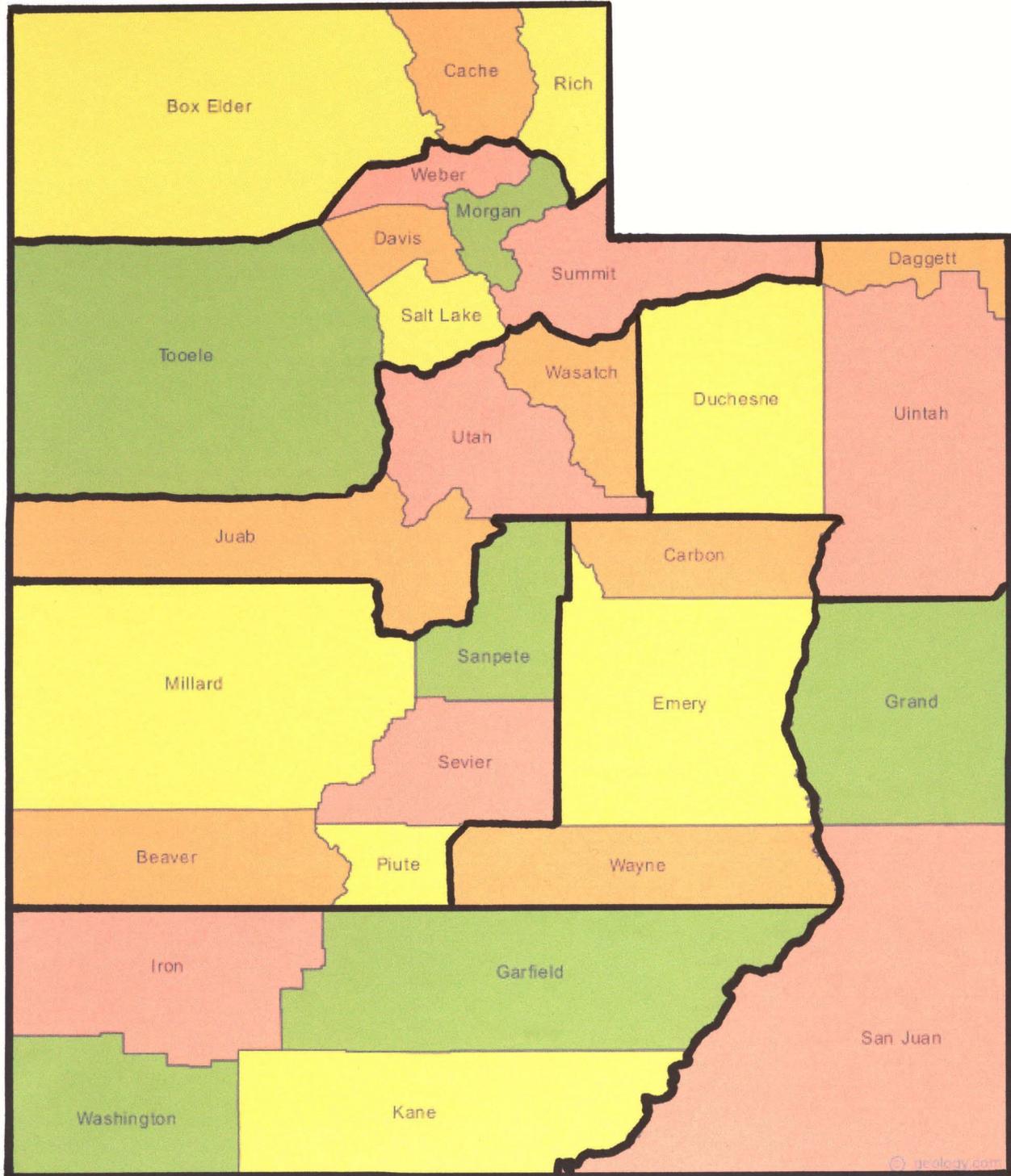
**INTRODUCTION OF TREASURERS:** We want to do a power point introduction of all of the treasurers at the beginning of our conference to help us get to know each other. Please send a photo of yourself to Susan's email; [susan.b@hydeparkcity.org](mailto:susan.b@hydeparkcity.org). If you do not send a photo, she may have to create one for you. .... Do you trust Susan? ..... I would send a photo, if I were you!!

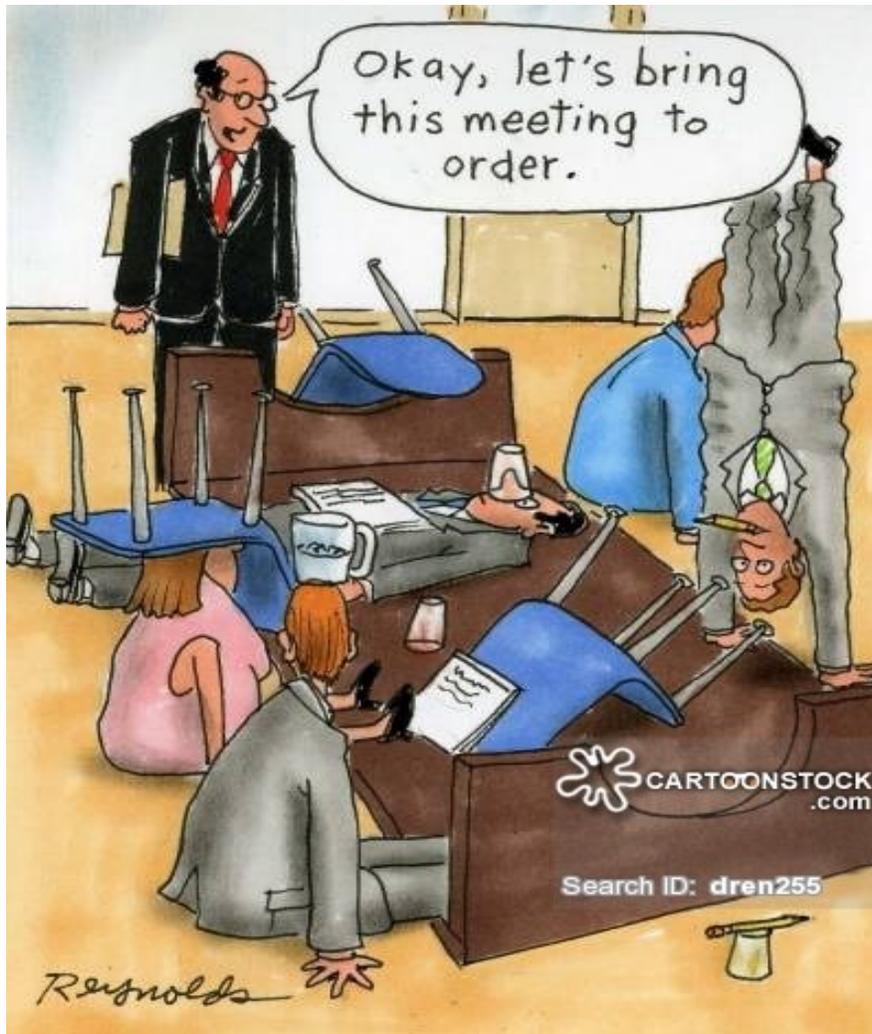
**GOLF:** If you are not participating in the CPFIM class, you may want to go golfing. Our Annual Golf Outing will be 2:00 p.m., Tuesday, May 12 at Dixie Red Hills Golf Course located at 645 West 1250 North in St. George. Contact Dave Zobell at 801-569-5001 or [davidz@wjordan.com](mailto:davidz@wjordan.com). You can also register online at [http://uapt.clubexpress.com/content.aspx?page\\_id=87&club\\_id=549421&item\\_id=365990](http://uapt.clubexpress.com/content.aspx?page_id=87&club_id=549421&item_id=365990).

### DOOR PRIZES:

If you would like to participate in the door prize drawings, please bring a \$10 door prize to be given away during breaks and meals. This is only optional, no obligation to participate. If you don't bring a gift, you won't put your name in the drawing.

Can you name the other Treasurer's in your County or neighboring Counties? Would you like to have a better relationship with the fellow Treasurers near you? Do you wish you always had someone to call for advice? During our conference, we will have a break-out session to get acquainted with the Treasurers in our Region. Our goal would be to have regular contact as a region to build and increase our support system.





Does this picture look fun, exciting, like something you would like to be involved in? ME TOO!!! We are looking for a few good Treasurer's to run for the board.. Tiffany LaJoice recently accepted a new position with St. George City, so there may be 3 positions open.. Serving on the board is not only fun and exciting, it gets you points toward your CPFA Certification. Included this newsletter is an application to run for the board. If you have questions concerning this, talk to any board member, past or present, and they will be happy to explain what goes on. Board meetings are fun, great networking opportunities and some good hard work. Serving on the board is very rewarding. So, don't be a wimp, fill out the

**BY-LAWS:** We have made a change to the by-laws by adding a fee schedule. Please take a look at the proposed addition. We will be voting on the change at our conference. Schedule attached.

