



2023 Clerks, Treasurers and Finance Officers Institute
Tundra Lodge – Green Bay, WI
June 21-23, 2023

Wednesday, June 21

- 11:30 a.m. REGISTRATION OPENS**
GENERAL SESSION, Dave Kurihara President, Wisconsin Clerks, Treasurers & Finance Officers, presiding
- 1:30 p.m. Welcome**— Green Bay Mayor Eric Genrich
- 1:45 p.m. Structuring & Training New Officials**
Moderator: Dave Kurihara, City Clerk/Treasurer, Lancaster
Speaker: Rebecca Houseman, City Manager, City of Fort Atkinson
- 2:30 - 2:45 p.m. BREAK**
- 2:45 - 3:45 p.m. Legislative Update**
Moderator: Steve Braatz, Jr., City Clerk, Wauwatosa
Speakers: Toni Herkert, Government Affairs Director, & Katie Scott, Government Affairs Specialist, League of WI Municipalities
- 5:00 - 7:00 p.m. NETWORKING HOUR & PICNIC**
Dinner will be served at 6:00 p.m.

Thursday, June 22

- 8:00 a.m. Light Breakfast (protein/fruit/coffee)**
- CONCURRENT SESSIONS**
- 9:00 - 10:30 a.m. 1) Run, Hide, Fight**
Moderator: Gail Tamez, Admin/Clerk/Treasurer, Wales
Speaker: Jeff Engelbrecht, Lieutenant-Operations Division, Green Bay Police Department
- 2) Bonds & the Economy**
Moderator: Jacob Crosetto, Finance Director/Clerk/Treasurer, Reedsburg
Speaker: Greg Prost, Chief Investment Officer, Robinson Capital
- 10:30 - 10:45 a.m. BREAK**
- 10:45 - 12:15 p.m. 1) ETF Administration: Info & Updates**
Moderator: Amy Barnes, Clerk/Treasurer, Village of Blanchardville
Speaker: ETF Staff
- 2) Investment Planning**
Moderator: Jacob Crosetto, Finance Director/Clerk/Treasurer, Reedsburg
Speaker: Greg Prost, Chief Investment Officer, Robinson Capital & John Major, Vice President, Gov't & Institutional Funds, American Deposit Management
- 12:15 p.m. BUSINESS MEETING/LUNCH**
- 1:15 - 2:45 p.m. 1) Licensing Do's & Don'ts**

Moderator: Michelle Ebbert, City Clerk/Treasurer, Ft. Atkinson
Speakers: Alcohol and Tobacco Special Agents Jason Lee and Rick Uhlig, Department of Revenue
Alcohol & Tobacco Enforcement

2) Long-Range Financial Planning

Moderator: Amy Barnes, Clerk/Treasurer, Village of Blanchardville
Speakers: David Ferris, Senior Municipal Advisor & Greg Johnson, Senior Municipal Advisor,
Ehlers, Inc.

2:45 - 3:00 p.m. BREAK

3:00- 4:30 p.m. 1) Odd Year Election Maintenance

Speakers: Steve Braatz, Jr., City Clerk, Wauwatosa, Kelly Sobieski, Clerk/Treasurer, Cudahy
Michelle Ebbert, City Clerk/Treasurer, Ft. Atkinson

2) Recording & Reconciling the Tax Roll

Moderator: Dave Kurihara, City Clerk/Treasurer, Lancaster
Speakers: David Ferris, Senior Municipal Advisor & Greg Johnson, Senior Municipal Advisor,
Ehlers, Inc.

Friday, June 23

8:00 a.m. Light Breakfast (protein/fruit/coffee)

9:00 a.m. Oh Snap! What Do I Do Now?
Speakers: Panel: CTFO Committee Officers

10:15 a.m. BREAK

10:30 a.m. Oh Snap! What Do I Do Now? - Continued
Speakers: Panel: CTFO Committee Officers

11:45 a.m. ADJOURNMENT

Guest Program includes the Wednesday Picnic.
Suggestions for local area points of interest will be provided at front
desk, but there is no formal guest tour or programing.

Thank you to our sponsor!
League Mutual Insurance

CLERKS, TREASURERS & FINANCE OFFICERS INSTITUTE COMMITTEE OFFICERS

President Dave Kurihara, City Clerk/Treasurer, Lancaster (TR)
1st Vice President Amy Barnes, Clerk/Treasurer, Village of Blanchardville (CL)
2nd Vice President Kelly Sobieski, Clerk/Treasurer, Cudahy (TR)
Secretary Michelle Ebbert, City Clerk/Treasurer, Ft. Atkinson (CL)
Treasurer Gail Tamez, Admin/Clerk/Treasurer, Wales (FD)
Trustees
Jacob Crosetto, Finance Director/Clerk/Treasurer, Reedsburg (FD)
Ashley Walker, City Clerk/Treasurer, Fennimore (CL)
Past Presidents
Ralph Chipman, City Finance Director, New Berlin (FD)
Steve Braatz, Jr., City Clerk, Wauwatosa (CL)