



ILLINOIS
MUNICIPAL
TREASURERS
ASSOCIATION

IMTA INSTITUTE

November 16-20, 2025 · Bloomington

Choose from Full Institute: Sunday, Noon-Thursday, Noon

Half Institute I: Sunday, Noon-Tuesday, Noon ▪ Half Institute II: Tuesday, Noon-Thursday, Noon

2025 Training Schedule

Sunday, November 16

- 11:30-12:30 pm Lunch and Registration
- 12:30-2:00 pm **Keynote Speaker: Band of Brothers**
Chief Joe Polenzani
- 2:15-4:45 pm **Welcome to Public Treasury: Compliance Requirements, Acct. Basics and Audit Insights**, *Jamie Wilkey – Lauterbach & Amen*
- 5:00-6:00 pm Dinner and Networking

Monday, November 17

- 8:00-9:30 am **Insight on Public Corruption and Financial Crimes**,
Jonas Harger - State of IL Public Integrity Bureau
- 9:45-10:45 am **Debt 101**, *Michael Williamson and Justin Fischer – Baird and Seema Patel - Chapman and Cutler*
- 11:00-Noon **Navigating Pension Fund Compliance Audits**, *Derek Flessner – Lauterbach & Amen*
- Noon-12:45 pm Lunch
- 12:45-1:45 pm **Accounting and Financial Reporting for Cash and Investments**
Anthony Cervini & Anna Cadmus - Sikich
- 2:00-3:00 pm **Investment Best Practices**, *Michelle Binns – PFM Asset Mgmt.*
- 3:15-4:45 pm **State and Federal Legislative Update**, *Brad Cole, Illinois Municipal League*

Tuesday, November 18

- 8:00-9:00 am **Putting Together a Tax Levy**, *Andrew Kim and Steve Adams, PTMA*
- 9:15-10:15 am **Retiree Health Coverage**, *Joel Babbitt - NPPFA*
- 10:30-Noon **Closing the Year Right: Payroll, Compliance and the OBBBA Overtime Tax Deduction**, *Tim Gavin – Lauterbach & Amen*
- Noon-12:45 pm Lunch
- 12:45-2:45 pm **Unclaimed Property Process and the Change in the Law**, *Austin Kulavic and Dustin Morrison - Illinois State Treasurer's Office*
- 3:00-4:30 pm **Cyber Security**, *Erin Slone – Illinois State Treasurer's Office*

Wednesday, November 19

- 8:00-10:00 am **Budgeting: Salary and Benefits**, *Molly Talkington and Julie Zolghadr*
- 10:15-Noon **FOIA/OMA Guidelines**, *Amalia Rioja - Vasselli Law*
- Noon-12:45 pm Lunch
- 12:45-2:00 pm **Costing Governmental Service: Procurement and Purchasing Policies**
- 2:15-3:15 pm **Empowering Local Government through Digital Transformation**
Rick Holmes - LOCIS
- 3:30-4:30 pm **BAM Roundtable**, *Brad Bettenhausen, Alta Long, Michael Peterson*

Thursday, November 20

- 8:00-9:00 am **Grant Funding**, *Alyson Gracy - IL Dept. of Commerce*
- 9:15-10:15 am **Navigating the Municipal Maze: Ratings, Rates & Regulatory Shifts** *Dalena Welcomer and Stephan Roberts - Raymond James*
- 10:30-Noon **HR Labor Laws**, *Jill O'Brien - Laner Muchin*

Cost & Registration

Full Institute: \$410 · Half Institute: \$235

Cost includes trainings, materials (electronic download), refreshments and the following meals: Sunday lunch and dinner; lunches Monday, Tuesday, Wednesday and Thursday; Heavy hors d'oeuvres evening reception on Tuesday.

Note: The hotels offers a complimentary full breakfast buffet for all attendees staying at the hotel.

Lodging

Institute is held at the DoubleTree by Hilton in Bloomington. The IMTA group rate is \$132/night (plus applicable fees/taxes.) Reservations can be made by calling 309-664-6446 or online [here](#). Reserve by Nov. 8 to receive the group rate.

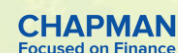
Register Here

Earn CPE's

28.5 Hours with Full Institute

14 Hours with Half Institute

Special Thanks to our Institute Partners



For more information or questions, contact IMTA at info@imtausa.org or 989-884-7230