

# Cooperative Financial Professional Certificate

## Agenda | Madison, Wisconsin

### Monday, March 23

**8–8:30 a.m. | Welcome and Overview**

*Lisa Billock (CFC), Charu Gupta (NRECA) and Gary Pfann (NRECA)*

**8:30–9:45 a.m. | The Cooperative Business Environment**

[CPE Field of Study: Business Management and Organization]

*Gary Pfann (NRECA)*

**9:45–10 a.m. | Break**

**10–11 a.m. | Financial Role in Business Planning**

[CPE Field of Study: Business Management and Organization]

*Gary Pfann (NRECA)*

**11 a.m.–12:30 p.m. | Capstone Project Discussion**

[CPE Field of Study: Personal Development]

*Rod Crile (Crile Consulting, LLC)*

**12:30–1:30 p.m. | Lunch**

**1:30–3:10 p.m. | Beyond the Numbers: Effective Communication Practices**

[CPE Field of Study: Communications & Marketing]

*Wendy Grapentine (Evolve Strategies, LLC)*

**3:10–3:25 p.m. | Break**

**3:25–5 p.m. | Beyond the Numbers: Effective Communication Practices, Cont.**

[CPE Field of Study: Communications & Marketing]

*Wendy Grapentine (Evolve Strategies, LLC)*

**5:15–6:30 p.m. | Networking Reception at Smitty Pub, 8th Floor**

*CFPC Participants, NRECA and CFC Staff Members*

### Tuesday, March 24

**8–9:45 a.m. | Setting Financial Policy**

[CPE Field of Study: Finance]

*Melissa Watts (Beacon Consulting Solutions)*

**9:45–10 a.m. | Break**

**10–11 a.m. | Financial Policy Exercise**

[CPE Field of Study: Finance]

*Melissa Watts (Beacon Consulting Solutions)*

**Locations:**

Session 1: Madison, WI

Session 2: Dulles, VA

**Contacts:**

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### 11 a.m.–Noon | Capstone Work Session

[CPE Field of Study: Personal Development]

*Rod Crile (Crile Consulting, LLC), Adam Hargett (CFC), Gary Pfann (NRECA), Aaron Stallings (CFC) and Melissa Watts (Beacon Consulting Solutions)*

### Noon–1:15 p.m. | Lunch

### 1:15–4 p.m. | KRTA for Strategic Decisions

[CPE Field of Study: Specialized Knowledge]

*Adam Hargett (CFC) and Aaron Stallings (CFC)*

### 4–4:15 p.m. | Break

### 4:15–5:05 p.m. | KRTA Presentation Exercise

[CPE Field of Study: Specialized Knowledge]

*Rod Crile (Crile Consulting, LLC), Adam Hargett (CFC) and Aaron Stallings (CFC)*

## Wednesday, March 25

### 8–9:30 a.m. | KRTA Group Presentations

[CPE Field of Study: Specialized Knowledge]

*Rod Crile (Crile Consulting, LLC), Adam Hargett (CFC) and Aaron Stallings (CFC)*

### 9:30–9:45 a.m. | Break

### 9:45–11:30 a.m. | Equity Management

[CPE Field of Study: Finance]

*Rod Crile (Crile Consulting, LLC)*

### 11:30 a.m.–12:45 p.m. | Lunch

### 12:45–2:45 p.m. | Equity Management, Cont.

[CPE Field of Study: Finance]

*Rod Crile (Crile Consulting, LLC)*

### 2:45–3 p.m. | Break

### 3–5 p.m. | Capstone Work Session

[CPE Field of Study: Personal Development]

*Rod Crile (Crile Consulting, LLC), Adam Hargett (CFC), Gary Pfann (NRECA) and Aaron Stallings (CFC)*

## Thursday, March 26

### 8–9:15 a.m. | The Ratemaking Process, Part 1

[CPE Field of Study: Finance]

*Jason Strong (CFC)*

#### Locations:

Session 1: Madison, WI

Session 2: Dulles, VA

#### Contacts:

[Charu.Gupta@nreca.coop](mailto:Charu.Gupta@nreca.coop)

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**9:15–9:30 a.m. | Break**

**9:30–11 a.m. | The Ratemaking Process, Part 1, Cont.**

[CPE Field of Study: Finance]

*Jason Strong (CFC)*

**11–11:15 a.m. | Break**

**11:15 a.m.–12:15 p.m. | Creating a Financial Forecast**

[CPE Field of Study: Specialized Knowledge]

*Adam Hargett (CFC)*

**12:15–1:30 p.m. | Lunch**

**1:30–3 p.m. | Creating a Financial Forecast, Cont.**

[CPE Field of Study: Specialized Knowledge]

*Adam Hargett (CFC)*

**3–3:15 p.m. | Break**

**3:15–5 p.m. | Creating a Financial Forecast Exercise**

[CPE Field of Study: Specialized Knowledge]

*Adam Hargett (CFC)*

## Friday, March 27

**8–9:30 a.m. | Communication Presentation Exercise**

[CPE Field of Study: Communications & Marketing]

*Wendy Grapentine (Evolve Strategies, LLC) and Gary Pfann (NRECA)*

**9:30–9:45 a.m. | Break**

**9:45–11:45 a.m. | Intentional Decision-Making**

[CPE Field of Study: Business Management and Organization]

*Cyndi Wentland (Intentional Leaders, LLC)*

**11:45 a.m.–Noon | Wrap-Up and Adjourn**

*Lisa Billock (CFC), Charu Gupta (NRECA) and Gary Pfann (NRECA)*



### Locations:

Session 1: Madison, WI

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**CPE Credits:** NRECA agrees to adhere to NASBA's standards for program development, presentation, measurement, and reporting. In accordance with the standards of the National Registry of CPE Sponsors, 34.5 CPE credits have been granted based on a 50-minute hour. State boards of accountability have final authority on the acceptance of individual courses for CPE credit.

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