

# Cooperative Financial Professional Certificate

## Fall 2025 Agenda | Madison, Wisconsin

### Monday, August 18

**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, Continued**

[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, August 19

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

[CPE Field of Study: Finance]

*Kris Dolan (CFC) and Hampton Oxendine (CFC)*

**9:45–10 a.m. | Break**

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

[CPE Field of Study: Finance]

*Kris Dolan (CFC) and Hampton Oxendine (CFC)*

#### Locations:

Session 1: Madison, WI

Session 2: Dulles, VA

#### Contacts:

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

[Robin.Rivers@nrucfc.coop](mailto:Robin.Rivers@nrucfc.coop)

#### Hosted in Partnership:



National Rural Utilities  
Cooperative Finance Corporation

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

[CPE Field of Study: Personal Development]

*Rod Crile (Crile Consulting, LLC), Kris Dolan (CFC), Hampton Oxendine (CFC) and Gary Pfann (NRECA)*

### Noon–1:15 p.m. | Lunch

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

[CPE Field of Study: Specialized Knowledge]

*Kris Dolan (CFC) and Hampton Oxendine (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), Kris Dolan (CFC) and Hampton Oxendine (CFC)*

## Wednesday, August 20

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

[CPE Field of Study: Specialized Knowledge]

*Rod Crile (Crile Consulting, LLC), Kris Dolan and Hampton Oxendine (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) and Hampton Oxendine (CFC)*

### 11:30 a.m.–12:45 p.m. | Lunch

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

[CPE Field of Study: Finance]

*Rod Crile (Crile Consulting, LLC) and Hampton Oxendine (CFC)*

### 2:45–3 p.m. | Break

### 3–5 p.m. | Capstone Work Session

[CPE Field of Study: Personal Development]

*Rod Crile (Crile Consulting, LLC), Hampton Oxendine (CFC) and Gary Pfann (NRECA)*

## Thursday, August 21

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

[CPE Field of Study: Finance]

*Brian Adams (CFC) and Helen Marshall CFC)*

### Locations:

Session 1: Madison, WI

Session 2: Dulles, VA

### Contacts:

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

[Robin.Rivers@nrucfc.coop](mailto:Robin.Rivers@nrucfc.coop)

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**9:15–9:30 a.m. | Break**

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

[CPE Field of Study: Finance]

*Brian Adams (CFC) and Helen Marshall (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]

*Trevor Barnett (CFC)*

**12:15–1:30 p.m. | Lunch**

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

[CPE Field of Study: Specialized Knowledge]

*Trevor Barnett (CFC)*

**3–3:15 p.m. | Break**

**3:15–5:00 p.m. | Creating a Financial Forecast, Continued  
and Exercise**

[CPE Field of Study: Specialized Knowledge]

*Trevor Barnett (CFC)*

## Friday, August 22

**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)*



**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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