

# Cooperative Financial Professional Certificate

## Spring 2025 Agenda | Madison, Wisconsin

### Monday, April 28

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

*Charu Gupta (NRECA), Gary Pfann (NRECA) and Robin Rivers (CFC)*

**8:30–9:45 a.m. | Financial Role in Business Planning**

[CPE Field of Study: Business Management and Organization]

*Gary Pfann (NRECA)*

**9:45–10 a.m. | Break**

**10–11 a.m. | The Cooperative Business Environment**

[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) and Robin Rivers (CFC)*

**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, April 29

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

[CPE Field of Study: Finance]

*Alison Deelstra (CFC) and Hampton Oxendine (CFC)*

**9:45–10 a.m. | Break**

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

[CPE Field of Study: Finance]

*Alison Deelstra (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)

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

[CPE Field of Study: Personal Development]

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

### **Noon –1:15 p.m. | Lunch**

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

[CPE Field of Study: Specialized Knowledge]

*Alison Deelstra (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), Alison Deelstra (CFC) and Hampton Oxendine (CFC)*

## **Wednesday, April 30**

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

[CPE Field of Study: Specialized Knowledge]

*Rod Crile (Crile Consulting, LLC) 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, May 1**

### **8–9:45 a.m. | Creating a Financial Forecast**

[CPE Field of Study: Specialized Knowledge]

*Trevor Barnett (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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**9:45–10 a.m. | Break**

**10 a.m.–Noon | Creating a Financial Forecast, Continued**

[CPE Field of Study: Specialized Knowledge]

*Trevor Barnett (CFC)*

**Noon–1:15 p.m. | Lunch**

**1:15–2:15 p.m. | Forecasting Exercise**

[CPE Field of Study: Specialized Knowledge]

*Trevor Barnett (CFC)*

**2:15–3:30 p.m. | The Ratemaking Process Part 1**

[CPE Field of Study: Finance]

*Omar Abdallah (CFC), Brian Adams (CFC) and Helen Marshall (CFC)*

**3:30–3:45 p.m. | Break**

**3:45–5:15 p.m. | The Ratemaking Process Part 1, Continued**

[CPE Field of Study: Finance]

*Omar Abdallah (CFC), Brian Adams (CFC) and Helen Marshall (CFC)*

### Friday, May 2

**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**

*Charu Gupta (NRECA), Gary Pfann (NRECA) and Robin Rivers (CFC)*



**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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