



OASBO, Northwest Chapter
CPIM Meeting
March 5, 2025

Stone Ridge Golf Club, Bowling Green, Ohio

Agenda

9:00-9:25		Registration
9:25-9:30		Welcome and Introductions
9:30 to 10:30	Session 1	Mike McCoullough UBS
10:40 to 11:40	Session 2	Bonefish Fraud Prevention
11:45 to 12:45		Lunch Buffet / Business Meeting (Sponsored by Bricker Grayden)
12:50 to 1:50	Session 3	Becky Princehorn & Nicole Donovan, Bricker & Graydon
2:00 to 2:50	Session 4	Rockmill Financial Consulting, LLC - David Conley Taxation Policies A Guide to Fair, Transparent, and Sustainable Taxation.
2:50-3:00		Drawings, and Adjourn

Individuals will still need to pay the annual certification fee (\$100) to the Treasurer of State and report hours for full CPIM credit.