



# **PFM's Fundamentals of Public Finance Seminar**

**Webinar Instructions & CPE Information**

October 6 – November 14, 2025



- **Computer Requirements:** In order to receive CPE credits, participants must use a desktop or a laptop computer. Microsoft Teams may not support the use of mobile devices (tablets or mobile phones) for polling and testing purposes.
  - **Note:** You do not need to download Microsoft Teams (Teams) to participate. You may run a temporary application from your browser.
  - When you join a course, you will be placed into the waiting room until the meeting is opened.
  - Please join using your **first and last name**. This will ensure that you receive your CPE certificate/credits.
- **Participants Muted:** All participants are muted upon entry.
- **Q&A:** Please use the Chat feature to ask any questions.
- **CPE Credit(s):** Courses qualify for CPE credits according to the information posted on the CPE Flyer. Your participation will be recorded through the software. You must be present and signed in for the entire session to receive credit.
- **Poll Questions:** Poll Questions will be administered throughout the webinar. You can answer them through a pop-up in Teams, the link posted in the chat, or by using the links provided in the email sent out the morning of the session. If you do not receive the Teams pop-up, use the links provided.

Your response to **all** Poll Questions is **required** to earn CPE Credit(s) for attending the course.
- **Survey Form:** A Microsoft Forms survey will be emailed to you at the end of the course. Please use the link to share your feedback about this course. You will be emailed a new survey link for each course attended. Your feedback will be used to improve future course offerings.

Completion and submission of the survey is required to earn CPE credit(s) for each course attended.



# Informational Email Example

PFM's Fundamentals of Public Finance Seminar: Finance Basics - Time Value of Money



Finance ...2025.pdf

Presenter ...25.pdf

Hello and Good morning! Below is some helpful information.

## **Logistics:**

As a secondary confirmation, this email contains the link to join this course. Some additional instructions are attached for your review.

As a reminder, all courses will be held via Microsoft Teams. You do not need to download Microsoft Teams to participate—you can simply run a temporary application through your browser. *When you join a course, you will remain in the virtual lobby until it is time for the course to begin.* You will be muted upon entering the session and you do not need to be on camera. Please join the session using your **first and last name** so that we can issue CPE credits to the correct individuals who meet the requirements.

## **Course:** ← **Course Information**

The presentation for **Finance Basics - Time Value of Money** and the presenter bios are attached. You may view the course description and other info relevant to seminar courses and CPE field of study on our website [here](#). Additional info about the seminar can be found on our website [here](#).

Timing: 4/9 at 1:30 – 3:00pm (ET)

Link to join the session: [Click here to join the session](#)

## **Poll Question:** ← **Poll Information**

These poll questions will be visited throughout the session. **Please note that these links will not be available to answer until it is asked within the presentation. Each question is asked separately.** They will also be linked within the chat during the presentation.

Question 1: <https://forms.office.com/r/qzPFBkkVjx>

Question 2: <https://forms.office.com/r/E9pFGVFBn8>

Question 3: <https://forms.office.com/r/Ypr283iunU>

Question 4: <https://forms.office.com/r/h9M124GqXu>

Question 5: <https://forms.office.com/r/hcbbapSykn>

You will be emailed a link to a **survey** following this course. Please feel free to share your feedback.

- ◆ For each course, an email will be sent in the morning on the day of the course. These emails contain important information related to the course and its associated CPE credit(s).
- ◆ **Course:** Includes course information, including start and end time, and a link to join the session.
- ◆ **Poll Questions:** Participants must complete all poll questions in order to be eligible for CPE credits.
  - If you are **unable** to access the question using the pop-up in Teams, use the link in the email.
  - The links to the poll questions will become active during the live course.



## Follow-up Email Example

Re: PFM's Fundamentals of Public Finance Seminar - Introduction to the Virtual Program

Thank you for attending today's course, **Introduction to the Virtual Seminar!** Reminder that this session **does not** provide CPE credit.

We would greatly appreciate your input. You may provide feedback using the link below:

<https://forms.office.com/r/Hq14QLRTM5> ← **Survey Link**

**Materials (Recordings, presentations, and surveys):** ← **Course Materials**

Materials and recordings for courses that have already taken place are now available on our website: <https://clientseminars.pfm.com/>. Please navigate to the Materials section. If you don't already see the site menu, you'll want to click on the menu icon next to the PFM logo to expand it. Please refer to the screenshot below.



Once on the Materials page, you will be prompted to enter a password. The case-sensitive password to access materials is **PFMSpring25**. You will need to click on "**Submit**" rather than hit "Enter". You may be prompted to enter the same password to watch each individual recording.

Materials and recordings for future scheduled courses will be added as we continue the program. You will have access to these materials and recordings through **Friday, August 29th**.

Survey's close on **Friday, May 30, 2025**. CPE certificates will be sent out by **July 11, 2025**.

If you have any questions, please feel free to reach out. Thank you!

- The survey link for the session will be here.
  - You must complete the survey in order to receive CPE credit(s).
- Instructions on how to retrieve session materials can be found here. Session materials include the recording, the presentation, and the link to the survey.
  - Here you can find the recording, slide deck and survey link.
- All surveys will close **November 21, 2025**.
- Anticipated CPE certificate date is **January 16, 2026**.
- Materials will be accessible until **March 27, 2026**.
- If you do not receive the follow-up email, please confirm your contact information with **Ciara Simmons** at [simmonsc@pfm.com](mailto:simmonsc@pfm.com)



<b><u>Session</u></b>	<b><u>Date</u></b>	<b><u>Start (ET)</u></b>	<b><u>End (ET)</u></b>
Introduction to the Virtual Program	10/7/2025	1:00 PM	2:00 PM
Finance Basics – Time Value of Money & the Yield Curve	10/8/2025	1:00 PM	2:30 PM
Municipal Bond Basics	10/9/2025	2:00 PM	3:30 PM
The Basics of Refunding Bonds	10/14/2025	2:00 PM	4:10 PM
The Importance of Investor Relations	10/15/2025	2:00 PM	3:00 PM
PFM Solutions – Synario	10/16/2025	2:00 PM	3:00 PM
Challenges and Opportunities of Utilizing SLGS and Introduction to Cash Optimization	10/17/2025	2:00 PM	3:00 PM
Swap Introduction, Applications and Monitoring	10/21/2025	2:00 PM	4:10 PM
Tax Reform – Municipal Market Update	10/22/2025	1:00 PM	2:00 PM
Bond Pricing	10/23/2025	2:00 PM	4:10 PM
Retirement Finance	10/28/2025	1:30 PM	2:30 PM
Alternative Project Delivery & P3's	10/29/2025	2:00 PM	3:00 PM
Economic Development and Tax Policy	10/30/2025	2:00 PM	3:00 PM
Diversity, Equity, Inclusion & Belonging (“DEIB”) at PFM and Public Finance Considerations	11/5/2025	2:00 PM	3:00 PM
Escrow Optimization with an Inverted Yield Curve	11/7/2025	2:00 PM	3:00 PM
Treasury Management Update	11/12/2025	2:00 PM	3:00 PM
Municipal Advisory Regulations & Contracts Overview	11/13/2025	2:00 PM	3:00 PM
The Impact of Higher Interest Rates and Arbitrage Rebate Considerations on Bond Proceeds Investments Strategies	11/14/2025	2:00 PM	3:00 PM



**1) Will I have access to the recordings if I am unable to make the session?**

- Yes, you will have access to all materials (recording and slide deck) for all sessions in the seminar where it is available.

**2) Is there another way to get CPE credit if I can not make the live session?**

- Unfortunately, no. You **must** attend the live session.

**3) What are the requirements for CPE credit?**

- You must attend the session in its entirety, complete all poll questions, and complete the survey for the session.

**5) I have completed a session but have not received my CPE credit. When will my certificate come?**

- You will receive **one** certificate for **all** your earned CPE credit. The anticipated date for receipt of certificates is **January 16, 2026**.
- The date on your certificate will be **November 14, 2025**.



## Steps to Import an ICS File to a Google Calendar

1. **Open Google Calendar:** Go to your Google Calendar in your web browser.
2. **Access Settings:** Click the gear icon (Settings) in the top right corner and select "Settings".
3. **Navigate to Import & Export:** In the left sidebar, click on "Import & Export".
4. **Initiate Import:** Click on the "Import" option.
5. **Select File:** Click "Select file from your computer" and choose the ICS file you want to import.
6. **Choose Calendar:** Select the calendar where you want to add the imported events.
7. **Confirm Import:** Click "Import" to begin the process.



# Disclosures

## ABOUT PFM

PFM is the marketing name for a group of affiliated companies providing a range of services. All services are provided through separate agreements with each company. This material is for general information purposes only and is not intended to provide specific advice or a specific recommendation. PFM does not provide tax, legal or accounting advice.

Financial advisory services are provided by PFM Financial Advisors LLC, a registered municipal advisor with the Securities and Exchange Commission (SEC) and the Municipal Securities Rulemaking Board (MSRB) under the Dodd-Frank Act of 2010.

Swap advisory services are provided by PFM Swap Advisors LLC which is registered as a municipal advisor with both the MSRB and SEC under the Dodd-Frank Act of 2010, and as a commodity trading advisor with the Commodity Futures Trading Commission. Additional applicable regulatory information is available upon request.

Consulting services are provided through PFM Group Consulting LLC. PFM's financial modeling platform for strategic forecasting is provided through PFM Solutions LLC.

For more information regarding PFM's services or entities, please visit [www.pfm.com](http://www.pfm.com).

Special disclaimer regarding the research and forecasts included in today's presentation: This research and any forecasts are based on current public information, as of the date of this presentation (or as of such date as may be specified in the presentation), that we consider reliable, but we do not represent it as accurate or complete, and it should not be relied on as such. The information, opinions, estimates and forecasts contained herein are also as of the date hereof and are subject to change without prior notification.

Case studies are provided for information purposes only and do not constitute specific advice or a recommendation. Opinions, results, and data presented are not indicative of future performance. Actual results may vary. Inclusion on this list does not represent endorsement of PFM's services.