CTAO COUNTY TREASURERS ASSOCIATION OF OHIO

2026 FALL CONFERENCE

NOVEMBER 17-19
HILTON POLARIS/COLUMBUS

Time	Tuesday, November 17
9:30 - 11:00 am	**CTAO Annual Business Meeting & Legislative Update** *(1 Hr AOS)* President **Kathy Kelich** will lead the Business Meeting where she will provide an overview of CTAO activities since Spring Conference, lead the Financial Update, brief the membership on activities by several CTAO Committees this past year, and provide the recommendations of the CTAO Nominating Committee for the 2027 Slate of Officers. Specific issues to be covered are the CTAO's priority legislation: SB 366 (Delinquent Property Tax Collection), HB 443 (Senior Protection Foreclosure Act), HB 493 (Tax Lien Sales), and proposed legislation to address an Ohio Ethic Commission Opinion pertaining to outside employment by treasurers.
11:00 - 11:30 am	**Association Update** From a newly-revamped website to upcoming member-focused projects, discover how CTAO is evolving to better serve Ohio's county treasurers. **Victoria Gresh** will share important association updates and provide a preview of initiatives designed to strengthen member engagement and enhance the value of CTAO membership.
1:00 - 2:00 pm	**Improving Mail Delivery, Reducing Costs and Accelerating Revenue with USPS Optimization** *(1 hr AOS)* Learn how the USPS processes mail, how to improve delivery and alternate ways of delivery for statements. This interactive session will allow attendees to ask questions and receive answers about what each county can do to improve their internal data and how to check returned mail, which has become a problem for all counties. Presenter: **John Dawson**, DivcoData
2:30 - 3:30 pm	**The Gus Frangos Act: What Treasurers Need to Know** *(1 hr AOS)* For more than seven years, the Ohio Land Bank Association has advocated for passage of the Gus Frangos Act, a comprehensive update to Ohio's land banking laws. As the legislation nears the finish line, OLBA representatives will provide a practical overview of the provisions most relevant to county treasurers. The session will walk through the key changes included in the legislation, explain how they intersect with the role of the county treasurer, and discuss what implementation may look like at the local level. The discussion will also provide context on why these changes were pursued and how they are intended to strengthen Ohio land banks. Presenter: **Shawn Carvin**, Executive Director, Ohio Land Bank Association
3:30 - 4:30 pm	**District Meetings** Gather with treasurers and staff from your geographic region to discuss the issues facing your offices and communities.

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	Tuesday, November 17 — continued
5:30 - 9:00 pm	**Evening at the 'Shoe: Dinner and Tour at Ohio Stadium** Join us for dinner in the Ohio Stadium Recruit Room, then go behind the scenes with the Red Coats on a tour of the Buckeye locker room, press box, and band center - home of The Best Damn Band in the Land. We'll finish on the field for a group photo under the lights of the Horseshoe.
9:00 - 11:00 pm	**After-Hours Networking** Not ready to call it a night? The hotel restaurant and bar, 17 Arrows, will be open to our attendees for drinks and light snacks after our evening activities. Each attendee will receive three drink tokens each evening. Additional drinks are on your own tab.
	Wednesday, November 18
9:00 - 10:00 am	**Building & Maintaining Strong Vendor Relationships** *(1 hr CPIM)* Explore how counties and vendors build strong partnerships through trust, communication and collaboration in this interactive session, featuring live audience questions and real-time results. Presenters: **Patty Melton**, InvoiceCloud, **Kellie Gray**, Williams County Treasurer, **Jill Schiller**, Hamilton County Treasurer, and **Eileen Stanic**, Meeder Public Funds
10:15 - 11:15 am	**Navigating the Yield Curve with your Investment Portfolio** *(1 hr CPIM)* Learn about current Federal Reserve policy, where interest rates stand today, and where they may be headed in the future. This discussion will also provide historical context on Fed policy, highlighting the fall and rise of rates over the past six years. Finally, you'll hear tips on how to use the current yield curve to help protect your portfolio against potential shifts in yield. Presenter: **Michael McCullough**, Touchstone Wealth Partners
11:30 am - 12:30 pm	**Finding the Hidden Revenue: A People, Process, Technology Framework for Business Process Optimization** *(1 hr CPIM)* Treasurer's offices often rely on processes that have evolved informally over time—layered notices, manual departmental handoffs, and duplicate data entry that quietly consume staff time and delay revenue recovery. This session introduces a practical business process optimization framework built around three pillars: People, Process, and Technology, grounded in a real county case study focused on departmental operations and taxpayer engagement workflows. Presenters: **Patrick Tiettmeyer**, VP Of Growth, Akava/UpRys; **Munjuzi Nyirenda**, Principal Consultant, Akava/UpRys; **Cheryl Brooks Sullivan**, Franklin County Treasurer, **Dusten Kolhorst**, IT Director, Franklin County Treasurer's Office; and **Lisa Perryman**, Director of Data Analytics, Franklin County Treasurer's Office.

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	Wednesday, November 18 — continued
1:30 - 2:45 pm	**Bankruptcy and County Real Estate Taxes** *(1 hr CPIM)* Join our presenters for a conversational discussion of where bankruptcy law meets the collection of county real estate taxes. The panel will review the four main types of bankruptcy, the automatic stay under 11 U.S.C. §362, the meeting of creditors, Chapter 13 plans, and filing a proof of claim as a governmental unit. They will also cover how real estate taxes are treated when they're paid directly or through a mortgage escrow, when property is surrendered, sold under land contract, or part of a probate estate, and when tax liens are present. Attendees are encouraged to ask questions throughout. Presenters: **Jennifer Connelly**, Delinquency Supervisor, Montgomery County Treasurer's Office; **John Jansing**, Trustee, Office of Chapter 13 Dayton; **Erin Renneker**, Staff attorney, Office of Chapter 13 Dayton; and **Jeanne Zurmehly**, Clermont County Treasurer.
3:00 - 4:00 pm	**The Ohio Ethics Law 2026: When Doing Right Matters** *(1 hr CPIM)* This engaging and interactive discussion explores the ongoing values and protections of the Ohio Ethics Law and dissects restrictions and prohibitions under this criminal statute. This session will assist those in public service who are subject to the law and those in the private sector who are regulated by or do business with governmental entities. Presenter: **Susan Willeke**, Training & Communications Manager, Ohio Ethics Commission
5:15 - 6:00 pm	**Cocktails & Conversation** Kick off the evening's celebration with drinks and appetizers.
6:00 - 7:30 pm	**President's Banquet & Leadership Installation Dinner** Join us for a delicious dinner as we say thank you to **Kathy Kelich** for her service as CTAO President and swear in our new officers, including incoming President **Dan Yemma**. Vendors are welcome to attend this dinner & network with treasurers throughout the evening.
7:30 - 9:30 pm	**Casino Night** Back by popular demand, we'll host another fun, low-stakes casino night. Learn the games, have fun with friends and colleagues, and try your luck at the roulette wheel or blackjack table.
9:30 - 11:00 pm	**After-Hours Networking** Not ready to call it a night? The hotel restaurant and bar, 17 Arrows, will be open to our attendees for drinks and light snacks after our evening activities. Each attendee will receive three drink tokens each evening. Additional drinks are on your own tab.

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	Thursday, November 19
9:00 - 10:00 am	**What To Consider When Transitioning Your Payables to Electronic Payments** *(1 hr AOS)* Checks and cash are still the default in many counties, but the shift toward electronic payments is accelerating. In this session, J.P. Morgan's Karl Lamar will help treasurers evaluate the full landscape of ACH, wire, FedNow, and digital wallets - not just the benefits, but the policy, procedural, and security trade-offs that come with them. Participants will leave with a clearer sense of what their office can implement now versus what belongs on a three-year roadmap, and how to weigh constituent convenience against the need to limit account exposure and protect public funds from fraud. Presenter: **Karl Lamar**, Treasury Sales Executive, JP Morgan Chase
10:15 - 11:15 am	**Treasurer Roundtable Discussions** *(1 hr AOS)* Treasurers will gather based on county population to discuss issues facing their offices and share advice and best practices with their peers & colleagues. We will once again be offering the opportunity for similar-sized counties to gather and discuss issues & topics of concern. We'll provide some questions for all groups to discuss. Group 1 - 1-35,000 people - Leader: Jeff McIntosh Group 2 - 35,001 - 55,000 - Leader: Robin Edwards Group 3 - 55,001 - 95,000 - Leader: Kathy Kelich Group 4 - 95,001 - 200,000 - Leader: Jeannie Zurmehly Group 5 - 200,000+ - Leader: Dan Talarek