

***Municipal Treasurers Association of Wisconsin  
Certified Municipal Treasurer of Wisconsin  
Certification Application***

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**SECTION I - PURPOSE OF CERTIFICATION PROGRAM**

This Professional Certification Program of the Municipal Treasurers Association of Wisconsin (MTAW) is designed to advance the professionalism of the municipal treasurer, the deputy or assistant treasurer, or other municipal officer charged with treasury responsibility. Municipal finance requires special study, knowledge, and skill as well as a high level of professional competence. This program establishes standards that recognize professional attainment and provides a system through which the required standards can be met. On completion of these standards, the applicant is recognized as a Certified Municipal Treasurer of Wisconsin.

**SECTION II - DESIGNATION OF PROFESSIONAL TITLE**

The professional title awarded by this program is Certified Municipal Treasurer of Wisconsin. The initials CMTW can be used after the name of the certified individual.

**SECTION III - ADMINISTRATION OF PROGRAM**

- A. The Education Committee of the MTAW shall administer the Professional Certification Program. The Education Committee prescribes policies regarding the general eligibility and the education and experience standards of the program, considers each applicant for the CMTW award, and recommends approved applicants to the Board of Directors for its approval.
- B. Certifications expire in five years unless an Application to Maintain Certification is submitted by each recipient and is approved by the Education Committee and the Board of Directors. In order to retain certification applicants must retain active membership in MTAW, if you are between jobs you can retain membership as a Treasurer at Heart.

**SECTION IV - ELIGIBILITY**

- A. **GENERAL STANDARDS** - Each applicant for CMTW certification must meet the following General Standards:
  1. The candidate must be an elected or an appointed municipal treasurer, deputy or assistant treasurer, or other municipal officer charged with the performance or supervision of treasury responsibilities as listed in MTAW's bylaws.
  2. The candidate must have been an active member of MTAW for at least two years immediately before applying for certification.
  3. The candidate must believe in and practice the Code of Ethics of the Municipal Treasurers Association of Wisconsin.
  4. The candidate must furnish a letter of sponsorship from any active member of the Association.
  5. The candidate must complete the typewritten application and forward it with each required enclosure and the required fee to the MTAW headquarters. CMTW application forms are available upon request. Applications are reviewed and verified by the officers and by the Board of Directors at the fall and spring board meetings.
  6. Each candidate must earn a minimum of **100 Education and Experience Standards points**, as specified in the following subsections.
- B. **EDUCATION STANDARDS** - A **maximum of 60 points** may be earned from the following Education Standards:
  1. Completion with a grade C or better of college or university courses related to treasury work. Two points per credit. **Max. of 20 points.**
  2. Completion of a state or regional course of higher education approved by the Certification Committee and by the Board of Directors and conducted by a fully accredited institution of higher education (UW-GB Treasurers Institute). **Max. 50 points.**
  3. Attendance at the one-year Treasurers Completion Course at UW-GB Institute. **30 points**
  4. Attendance at the one-year Clerks Completion Course at UW-GB Institute. **10 points**
  5. Attendance at an educational conference of the WMCA, WGFOA, Towns Association, or League of WI Municipalities. Two points per year. **Max. of 20 points.**
  6. Attendance at an educational conference of the MTAW. Ten points per conference. **Max. of 50 points.**

7. Attendance at a conference of APT US&C. Five points per year. **Max. of 20 points.**
8. Attendance at the New Treasurers Workshop. **5 points.**
9. Attendance at a MTAW district meeting, and advanced education sponsored by UW-GB, which includes Master Academy, Administrators Academy and one-day training sessions. Two points. **Max. of 10 points.**
10. Completion of the Government Finance Officers Association (GFOA) Professional Recognition program. **20 points.**
11. Completion of a bachelor's degree in public administration, accounting, finance, or a related field approved by the Certification Committee. **50 points.**
12. Completion of an associate degree in public administration, accounting, finance, or a related field approved by the Certification Committee. **35 points.**
13. Completion of a bachelor's degree in an unrelated field. **15 points.**
14. Completion of a master's degree in a related field. **50 points.**
15. Completion of a doctoral degree in a related field. **50 points.**
16. Attendance at a non-municipal organization sponsored training (includes trainings offered by our Municipal Service Providers and college continuing education courses). **1 point per 8 hours of training. Max 10 points.**

*C. EXPERIENCE STANDARDS*

A maximum of **60 points** towards certification may be earned from the following Experience Standards:

1. Experience as a municipal treasurer or financial officer. Five points per year. **Max. of 25 points.**
2. Administrative experience in local government before municipal treasury work. Two points per year. **Max. of 20 points.**
3. Administrative experience in county, state or federal government or in business or industry before municipal treasury work. One point per year. **Max. of 10 points.**
4. Service as a committee member of the MTAW, APT US&C or UW-GB Institute Advisory Board. Two points per committee per year. **Max. of 10 points.**
5. Service as a committee chair or conference committee member of the MTAW. Five points per committee per year. **Max. of 10 points.**
6. Service as a district director or parliamentarian of MTAW or APT US&C. Five points per year. **Max. of 20 points.**
7. Service as an officer of the MTAW or APT US&C. Five points per year. **Max. of 25 points.**
8. Service as an actively assigned mentor. 5 points per year assigned. **Max. of 20 points.**
9. Receipt of MTAW J.J. Krueger Award. **15 points.**
10. Receipt of special awards presented by the MTAW or APT US&C. Five points each. **Max. of 15 points.**
11. Instructor of an approved course toward certification. One point per hour of instruction. **Max. of 10 points.**
12. Publication of technical article in MTAW newsletter or APT US&C News. Two Points per article. **Max. of 10 points.**

**SECTION V - APPLICATION FEE**

A fee of \$50 shall accompany the CMTW application. The fee is not refundable. If the application is not approved, the fee will remain with MTAW and will be applicable only to reapplication at a future date.

**SECTION VI - APPEALS**

A candidate whose application is not approved by the Education Committee shall be notified in writing by the Education Committee. The candidate may appeal the decision of the Education Committee within thirty days after receiving notice of non-approval. The appeal must be made in writing to the Chair of the Education Committee at the headquarter address of the MTAW. The Education Committee and the Board of Directors shall review the application, giving consideration to the appeal. The decision of the Board of Directors shall be final.

**SECTION VII - PRESENTATION OF CERTIFICATE**

The CMTW Certificate will be presented to the successful applicant with appropriate recognition of achievement at the next annual conference of the MTAW and after the annual conference at a meeting of officers of the municipality by which the treasurer is employed. Presentation at the meeting of the municipal officers shall be made by a member of the Education Committee, by a member of the Board of Directors, or by an MTAW designee. The MTAW shall provide a news release for local media.

**CERTIFIED MUNICIPAL TREASURER OF WISCONSIN**  
**Application for Certification**

Applicant _____	Membership Years _____
Address _____	Application fee _____
Address _____	General eligibility _____
Phone _____	Education points _____
Municipality _____	Experience points _____
Official title _____	Total points _____
Application date _____	EC Chair approval _____
Received by EC _____	Board of Directors approval _____

**GENERAL ELIGIBILITY**

- The candidate must be an elected or an appointed municipal treasurer, deputy or assistant treasurer, or other municipal officer charged with the performance or supervision of treasury responsibility as listed in the MTAW bylaws.
- The candidate must have been an active member of the MTAW for at least two years immediately before applying for certification.
- The candidate must believe and practice the Code of Ethics of the MTAW.
- The candidate must furnish a letter of sponsorship from any active member of the MTAW.
- The candidate must complete the typewritten application and forward it with all the required enclosures and the required fee of \$50 to MTAW headquarters. Applications are reviewed and verified by the Certification Committee and by the Board of Directors at the fall and spring board meetings.
- Each candidate must earn a minimum of 100 Education and Experience points. Certifications expire five years from date of certification.

I hereby certify that I have been an active member of the MTAW for the period shown below and that I believe in and practice the Code of Ethics. Permission is granted to MTAW to verify the accuracy of my statements and enclosures if necessary.

Active from: \_\_\_\_\_ to: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Please enclose:

- Certification of election or appointment to office.
- Letter of sponsorship by active member of MTAW.
- Check or money order for \$50.

**NOTE: The application fee is not refundable. However, it can be applied to reapplication at a later date if this application is not approved. The fee cannot be applied to annual membership dues.**

\_\_\_ Yes \_\_\_ No      I request MTAW to send news releases of my certification to local newspapers.

Paper Name \_\_\_\_\_ Contact Person \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Email Address \_\_\_\_\_

\_\_\_ Yes \_\_\_ No      I request MTAW notify my mayor or city manager of my certification.

Name \_\_\_\_\_ Title \_\_\_\_\_

**EDUCATION POINTS**

A maximum of 60 points toward certification may be earned from the following Education Standards. List total points for each standard in the far-right hand column. **Attach a sheet if extra space is needed.**

- |     |   | <u><b>POINTS</b></u> |
|-----|---|----------------------|
| 1.  | Completion with a grade C or better of college or university courses related to treasury work. Two points per credit. <b>Max. 20 points. Enclose proof marked "ED-1"</b> List below:<br><b>Course name/number                      College or University      Grade      Hours</b>  | _____                |
| 2.  | Completion of a state or regional course of higher education approved by the Certification Committee and by the Board of Directors and conducted by a fully accredited institution of higher education. (Treasurer's Institute at UW-Green Bay or completion of a full MTAW sponsored treasury course at a technical college.) <b>Max. 50 points.</b><br><b>Course date                                      Sponsored by                      Conducted by</b> | _____                |
| 3.  | Attendance at the one-year Treasurers Completion Course at UW-GB Institute. <b>30 points Enclose proof marked "ED-3".</b>   | _____                |
| 4.  | Attendance at the one-year Clerks Completion Course at UW-GB Institute. <b>10 points Enclose proof marked "ED-4".</b>   | _____                |
| 5.  | Attendance at an educational conference of WMCA, WGFOA, Towns Association, or League of Wisconsin Municipalities. Two points per conference. <b>Max. 20 points.</b> List below:<br><b>Date    Held at (city, location)</b>  | _____                |
| 6.  | Attendance at educational conference of MTAW. Ten points per year. <b>Max. 50 points.</b> List below:<br><b>Date    Held at (city, location)</b>  | _____                |
| 7.  | Attendance at (August) conference of APT-US&C. Five points per year. <b>Max. 20 points.</b> List below:<br><b>Date    Held at (city, location)</b>  | _____                |
| 8.  | Attendance at the New Treasurers Workshop. <b>5 points.</b> List below:<br><b>Date    Held at (city, location)</b>  | _____                |
| 9.  | Attendance at a MTAW district meeting, and advanced education sponsored by UW-GB, which includes Master Academy, Administrators Academy and one-day training sessions. Two points per meeting. <b>Max. 10 points.</b> List below:<br><b>Date    Held at (city, location)      District number</b>   | _____                |
| 10. | Completion of the Government Finance Officers Association (GFOA) Professional Achievement Recognition (PAR) program. <b>20 points. Enclose proof, marked "ED-7".</b>  | _____                |
| 11. | Completion of a bachelor's degree in public administration, accounting, finance, or a related field. <b>50 points. Enclose proof marked "ED-8". List major.</b>   | _____                |
| 12. | Completion of an associate degree in public administration, accounting, finance, or a related field. <b>35 points. Enclose proof marked "ED-9". List major.</b>   | _____                |

- 13. Completion of a bachelor's degree in an unrelated field. **15 points.**  
**Enclose proof marked "ED-10". List major.** \_\_\_\_\_
  - 14. Completion of a master's degree in a related field. **50 points.**  
**Enclose proof marked "ED-11". List major.** \_\_\_\_\_
  - 15. Completion of a doctoral degree in a related field. **50 points.**  
**Enclose proof marked "ED-12". List major.** \_\_\_\_\_
  - 16. Attendance at a non-municipal organization sponsored training (includes trainings offered  
By our Municipal Service Providers and college continuing education courses). **1 point per  
8 hours of training. Max. 10 points.**  
**Enclose proof marked "ED-16".** \_\_\_\_\_
- TOTAL EDUCATION POINTS** \_\_\_\_\_

**EXPERIENCE POINTS**

A maximum of 60 points toward certification may be earned from the following Experience Standards.  
List total points for each standard in the far-right hand column.

- |  | <u><b>POINTS</b></u> |
|--|----------------------|
| 1. Experience as a municipal treasurer or financial officer. Five points per year. <b>Max. 25 points.</b><br><b>Enclose proof marked "EXP-1". List below:</b><br>From ___ to ___ Municipality Years  | _____                |
| 2. Administrative experience in local government before municipal treasury work.<br>Two points per year. <b>Max. 20 points. Enclose proof marked "EXP-2". List below:</b><br>From ___ to ___ Local Government Years                                      | _____                |
| 3. Administrative experience in county, state or federal government or in business or industry before<br>municipal work. One point per year. <b>Max. 10 points. Enclose proof marked "EXP-3".</b><br>From ___ to ___ Government Agency or Business Years | _____                |
| 4. Service as a member of a committee of the MTAW, APT US&C or UW-GB Institute Advisory Board.<br>Two points per year per committee. <b>Max. 10 points.</b> List below:<br>Committee Sponsoring Association Years  | _____                |
| 5. Service as a committee chair or conference committee member of the MTAW. Five points per<br>committee per year. <b>Max. 10 points.</b> List below:<br>Committee Sponsoring Association Years  | _____                |
| 6. Service as a district director or parliamentarian of the MTAW or APT US&C. Five points<br>per year. <b>Max. 20 points.</b> List below:<br>Position Sponsoring Association Years   | _____                |

- 7. Service as an officer of MTAW or APT US&C. Five points per year. **Max. 25points.** List below:  
Office                                      Sponsoring Association                                      Years \_\_\_\_\_
- 8. Service as an actively assigned mentor. 5 points per year assigned. **Max. of 20 points** \_\_\_\_\_  
Treasurer Assigned to                                      Year
- 9. Receipt of the MTAW J.J. Krueger Award. **15 points.** List below:  
Date Received                                      Conference Site (City) \_\_\_\_\_
- 10. Receipt of special awards presented by MTAW or APT US&C. Five points each. **Max. 15 points.**  
List below:  
Special Award                                      Sponsoring Association                                      Date \_\_\_\_\_
- 11. Instructor of any approved course toward certification. One point per hour of instruction.  
**Max. of 10 points.**  
Dates of Instruction                                      Location (City, State) \_\_\_\_\_
- 12. Publication of a technical article in MTAW Newsletter, or MTA US&C News. Two points  
per article. **Max. 10 points.**  
Name of Article                                      Publication                                      Date \_\_\_\_\_

**TOTAL EXPERIENCE POINTS** \_\_\_\_\_

**SUMMARY**

**TOTAL EDUCATION POINTS (Maximum 60 points)** \_\_\_\_\_

**TOTAL EXPERIENCE POINTS (Maximum 60 points)** \_\_\_\_\_

**TOTAL EDUCATION AND EXPERIENCE POINTS (Minimum 100 points)** \_\_\_\_\_

**Code of Ethics for the Municipal Treasurer**

Professional competence and ethics are parallel concerns for the municipal treasurer. Officials at every level of government are faced with public skepticism. Today’s treasurers find themselves watched more carefully by the public, their actions scrutinized for signs of bias or personal interest. Treasurers are held accountable as custodians of public funds, which places them in an especially delicate position.

Ethics are an inducement for treasurers to strive for higher levels of performance. The ethical municipal treasurer must always think in terms of the total public welfare, the overall good, the long-range effect, and eschew the temptation to please just the individual or group pressing its case.

Section 62.09(9)(d), Wisconsin Statutes, states that a treasurer “shall receive no compensation except the salary fixed by the council...” (Emphasis added). It should be obvious to all treasurers, except any engaged in outright corruption, that the only money they may legally accept for performing their duties is their salary. The troublesome area is that of “other compensation”. Also, see section 946.12(5) Wisconsin Statutes.

Treasurers should politely refuse to accept any gifts that are offered to them personally. Such gifts, such as football tickets or other offers of free entertainment, are innocently offered, but such gifts may be difficult, if not impossible, to justify the actual intent, that makes it important to always refuse gifts. A treasurer should not directly or indirectly accept any gift, whether in the form of money, services, loan, travel, entertainment, hospitality, promise, or any other form, under circumstances in which members of the public could reasonably infer that the gift was intended to influence him or her, or could reasonably be expected to influence him or her in the performance of official duties, or was intended as a reward for any official action on the treasurer's part.

It cannot be emphasized enough that it is the appearance, not the actual intent, involved that can be so incriminating in the eyes of the public. Large segments of the public distrust all government officials, whether elected or not, and they will assume guilt, not innocence, whenever there is an opportunity to make a judgment. This is true to a certain degree in all municipalities, especially small communities, where everyone knows every other person's business and rumors run rampant.

Treasurers, and all local government officials, can take affirmative steps to safeguard themselves from the charge of unethical conduct in certain circumstances. The municipality's governing body and all of its officials can formulate and adopt some simple guidelines on unsolicited gifts. Guidelines can be established which allow a local official to accept such innocuous unsolicited gifts as meals and cigars up to a modest maximum dollar level. Guidelines can be very useful in establishing realistic parameters; public officials should not have to be altogether isolated from normal social practices among friends and associates on appropriate occasions. In the absence of any official guidelines, the wise course of conduct is for treasurers to decline any gifts.

**I agree to abide by the Code of Ethics for the Municipal treasurer.**

\_\_\_\_\_  
Signature of applicant

\_\_\_\_\_  
Date

**Applications must be submitted by April 1<sup>st</sup> to be approved at the MTAW Spring Conference or by September 1<sup>st</sup> to be approved at the MTAW Fall Conference.**

**Send completed form along with appropriate documentation and a check made payable to MTAW to:**

**MTAW  
Terry Estness, Executive Secretary  
2408 North 67<sup>th</sup> Street  
Wauwatosa, WI 53213  
Phone 414/453-1442 • FAX 414/453-0526**

APPROVED: \_\_\_\_\_, MTAW President      DATE: \_\_\_\_\_

revised 9.27.17