



## Municipal Treasurers Association of Wisconsin

### **Certified Municipal Treasurer of Wisconsin Application for Certification**

**SECTION I - PURPOSE OF APPLICATION TO MAINTAIN CERTIFICATION** – 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.

**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 MTAW Education Committee 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** – Each applicant for CMTW certification must meet the following general eligibility standards.

1. Applicant must be an elected or appointed municipal treasurer, deputy or assistant treasurer or other municipal officer charged with the performance or supervision of treasurer responsibilities as listed in the MTAW's bylaws.
2. Applicant must have maintained continuous MTAW active membership for:
  - a. each of the two years immediately before applying for certification
  - b. at the time of application
  - c. at the time of approval
3. Applicant must believe in and practice MTAW's Code of Ethics.
4. Applicant must furnish a letter of sponsorship from any active MTAW member.
5. Applicant must submit one copy of the application by March 1st or August 1st of the year in which certification expires, accompanied with all required enclosures, and required application fee to MTAW Headquarters. Applications are reviewed and verified by the Education Committee.
6. Applicant must have earned a minimum combination of one hundred (100) Education and Experience points, as specified in the Education & Experience sections of this application. Certifications must be renewed every five years. Those members with an expired CMTW credential must complete a new Application for Certification.

**SECTION V – APPLICATION FEE** – A \$75.00 non-refundable fee shall accompany the Application for Certification.

**SECTION VI – APPEALS** – The Education Committee Chair shall notify a candidate whose application is not approved by the Committee in writing. The candidate must appeal the Committee's decision within thirty (30) days of written notification. The written appeal must be sent to the Committee Chair at MTAW's Headquarters' address. The Chair shall submit the appeal to the MTAW Board of Directors for final determination.

**SECTION VII - PRESENTATION OF CERTIFICATE** - The CMTW Certificate will be presented to the successful applicant at the next MTAW conference.

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

Applicant \_\_\_\_\_  
 Title \_\_\_\_\_  
 Address \_\_\_\_\_  
 City/State/Zip \_\_\_\_\_  
 Municipality \_\_\_\_\_  
 Phone \_\_\_\_\_  
 Email \_\_\_\_\_  
 Application Date \_\_\_\_\_

Membership years \_\_\_\_\_  
 Application fee \_\_\_\_\_  
 General eligibility \_\_\_\_\_  
 Education points \_\_\_\_\_  
 Experience points \_\_\_\_\_  
 Total points \_\_\_\_\_  
 EC Chair approval \_\_\_\_\_  
 Board of Directors approval \_\_\_\_\_

**GENERAL ELIGIBILITY (review & check boxes)**

- I am an elected or appointed municipal treasurer, deputy or assistant treasurer or other municipal officer charged with the performance or supervision of treasurer responsibilities as listed in the MTAW's bylaws.
- I have been an active MTAW member for at least two (2) years immediately before applying for certification.
- I believe and practice the Code of Ethics of the MTAW.
- I have completed the application and forwarded it with all the required enclosures and the required fee of \$75 to MTAW headquarters. Applications are reviewed and verified by the Education Committee and by the Board of Directors at the fall and spring board meetings.
- I have earned a minimum of 100 Education and Experience Points and understand the CMTW certification must be renewed every five years.
- I grant permission to MTAW to verify accuracy of statements and enclosures.

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

\_\_\_\_\_ Yes \_\_\_\_\_ No

I request MTAW to send news releases of my certification to local newspapers.

Paper Name \_\_\_\_\_

Contact Person \_\_\_\_\_

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

\_\_\_\_\_ Yes \_\_\_\_\_ No

I request MTAW notify my mayor or city manager of my certification.

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

Municipality \_\_\_\_\_

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

**EDUCATION**

A maximum of 60 points toward certification may be earned from the following Education Standards.  
 List total points for each standard.

1. Attendance at a MTAW One-Day Treasurers Workshop.

**5 points**  
**Earned:** \_\_\_\_\_

List below:

Date \_\_\_\_\_ Held at (city, location) \_\_\_\_\_

\_\_\_\_\_

2. Attendance at an MTAW educational conference. Five points per conference.

**Max. 50 points**

**Earned:** \_\_\_\_\_

List below:

Date Held at (city, location)

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3. Attendance at a MTAW district meeting or advanced education sponsored by UW-GB, which includes Master Academy, Administrators Academy and one-day training sessions. Two points per 6-hour day.

**Max 10 points**

**Earned:** \_\_\_\_\_

**Enclose proof marked "ED-3".**

List below:

Date Held at (city, location) District number

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4. Attendance at the UW-GB Institute one-year Treasurers Completion Course.

**30 points**

**Earned:** \_\_\_\_\_

**Enclose proof marked "ED-4".**

5. Attendance at the UW-GB Institute one-year Clerks Completion Course.

**10 points**

**Earned:** \_\_\_\_\_

**Enclose proof marked "ED-5".**

6. Attendance at either WMCA, WGFOA, Towns Association, or League of Wisconsin Municipalities educational conferences. Two points per conference.

**Max. 20 points**

**Earned:** \_\_\_\_\_

**Enclose proof marked "ED-6".**

List below:

Date Held at (city, location)

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|---|--|---|-------------|--------------|--------------|
| 10.   | Completion of a state or regional course of higher education approved by the Education Committee and by the Board of Directors and conducted by a fully accredited institution of higher education. (UW Green Bay Treasurers Institute – 3-year program)<br><b>Enclose proof marked "ED-10".</b> | <b>Max. 50 points</b><br><b>Earned:</b> _____ |             |              |              |
| List below:<br><table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Course date</td> <td style="width: 30%; text-align: center;">Sponsored by</td> <td style="width: 40%; text-align: center;">Conducted by</td> </tr> </table> <hr style="border: 0.5px solid black; margin-top: 10px;"/> |  |   | Course date | Sponsored by | Conducted by |
| Course date   | Sponsored by   | Conducted by                                  |             |              |              |
| 11.   | Completion of the Government Finance Officers Association (GFOA) Professional Achievement Recognition (PAR) program.<br><b>Enclose proof, marked "ED-11".</b>  | <b>20 points</b><br><b>Earned:</b> _____      |             |              |              |
| 12.   | Completion of an associate degree in public administration, accounting, finance, or a related field.<br><b>Enclose proof marked "ED-12". List major.</b>   | <b>35 points</b><br><b>Earned:</b> _____      |             |              |              |
| 13.   | Completion of a bachelor's degree in public administration, accounting, finance, or a related field.<br><b>Enclose proof marked "ED-13". List major.</b>   | <b>50 points</b><br><b>Earned:</b> _____      |             |              |              |
| 14.   | Completion of a bachelor's degree in an unrelated field.<br><b>Enclose proof marked "ED-14". List major.</b>   | <b>15 points</b><br><b>Earned:</b> _____      |             |              |              |
| 15.   | Completion of a master's degree in a related field.<br><b>Enclose proof marked "ED-15". List major.</b>  | <b>50 points</b><br><b>Earned:</b> _____      |             |              |              |
| 16.   | Completion of a doctoral degree in a related field.<br><b>Enclose proof marked "ED-16". List major.</b>  | <b>50 points</b><br><b>Earned:</b> _____      |             |              |              |

**TOTAL EDUCATION POINTS – MAX 60** \_\_\_\_\_

<b>EXPERIENCE</b>
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A maximum of 60 points toward certification may be earned from the following Experience Standards.  
 List total points for each standard.

- |  |  |   |            |          |              |       |
|--|--|---|------------|----------|--------------|-------|
| 1.   | Experience as a municipal treasurer or financial officer. Five points per year.<br><b>Enclose proof marked "EXP-1".</b>  | <b>Max. 25 points</b><br><b>Earned:</b> _____ |            |          |              |       |
| List below:<br><table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">From _____</td> <td style="width: 15%;">to _____</td> <td style="width: 35%; text-align: center;">Municipality</td> <td style="width: 35%; text-align: center;">Years</td> </tr> </table> <hr style="border: 0.5px solid black; margin-top: 10px;"/> <hr style="border: 0.5px solid black; margin-top: 10px;"/> <hr style="border: 0.5px solid black; margin-top: 10px;"/> <hr style="border: 0.5px solid black; margin-top: 10px;"/> |  |   | From _____ | to _____ | Municipality | Years |
| From _____   | to _____   | Municipality                                  | Years      |          |              |       |
| 2.   | Service as a MTAW or APT US&C committee for one year. Service as UW-GB Institute Advisory Board Member for one term even if it is listed as less than one year.<br>Two points per year per committee or per term for Advisory Board. | <b>Max. 10 points</b><br><b>Earned:</b> _____ |            |          |              |       |

List below:		
Committee	Sponsoring Association	Years

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3. Service as a MTAW committee chair or conference committee member. Five points per year per committee. **Max. 10 points**  
**Earned:** \_\_\_\_\_

List below:  
Committee

Sponsoring Association

Years

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4. Service as a MTAW or APT US&C district director or parliamentarian. Five points per year. **Max. 20 points**  
**Earned:** \_\_\_\_\_

List below:  
Position

Sponsoring Association

Years

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5. Service as a MTAW or APT US&C officer. Five points per year. **Max. 25 points**  
**Earned:** \_\_\_\_\_

List below:  
Office

Sponsoring Association

Years

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6. Receipt of the MTAW J.J. Krueger Award. **15 points**  
**Earned:** \_\_\_\_\_

List below:

Date Received

Conference Site (City)

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7. Receipt of special awards presented by MTAW or APT US&C. Five points each. This does not include any scholarships you may have received. **Max. 15 points**  
**Earned:** \_\_\_\_\_

List below:

Special Award

Sponsoring Association

Date

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8. Instructor of a MTAW approved course. One point per hour of instruction. **Max. 10 points**  
**Earned:** \_\_\_\_\_

Dates of Instruction

Location (City, State)

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9. Publication of a MTAW website technical article. Two points per article. **Max. 10 points**  
 Article written by the member that is 750 – 1500 words and relevant to Municipal Treasurer duties **Earned:** \_\_\_\_\_  
 Provide proof from Multi-Media Committee of publication on MTAW Website. Must attach article.

Name of Article	Website Posting Date
_____	_____
_____	_____
_____	_____

10. Service as an actively assigned MTAW mentor. Five points per year assigned. Verification **Max. 20 points**  
 from the Mentor Committee is required to obtain points. **Earned:** \_\_\_\_\_

Treasurer Assigned to	Year
_____	_____
_____	_____
_____	_____
_____	_____

**TOTAL EXPERIENCE POINTS – MAX 60** \_\_\_\_\_

<b>SUMMARY</b>
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<b>TOTAL EDUCATION POINTS</b> <i>(Maximum 60 points)</i>	_____
<b>TOTAL EXPERIENCE POINTS</b> <i>(Maximum 60 points)</i>	_____
<b>TOTAL EDUCATION AND EXPERIENCE POINTS</b> <i>(Minimum 100 points)</i>	_____

## 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 March 1<sup>st</sup> to be approved at the MTAW Spring Conference or by August 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  
John Schlice, Executive Secretary  
2140 Church Street, Stevens Point, WI 54481  
Phone 715-997-9446 – email: mta-wi@charter.net

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