

2023 CCTPTA Quadrennial Training
Douglas County Fairgrounds | Castle Rock
February 6-8, 2023

Agenda and Class Schedule

Note: this agenda is a draft and is subject to change.

Monday, February 6

- 9:00 – 10:30 a.m. **Welcome**
Association Overview/Purpose- The Colorado County Treasurer and Public Trustee Association of Colorado was created for the following purposes:
- * To further the education of the members and their staffs;
 - * To promote professionalism of the members;
 - * To assist in improving members' office efficiencies;
 - * To provide for the exchange of information and ideas.
- 9:15 – 10:30 a.m. **Introductions**
- Association Officers
 - Committees
 - Treasurer/Public Trustee introductions
 - Treasurer/Public Trustee Overview
- 10:30 – 10:45 a.m. **Break**
- PUBLIC TRUSTEE DAY**
- 10:45 – 11:45 a.m. **Public Trustee Overview**
- Duties of PT
 - Escrow
 - Budgets
 - PTAC attorney information
- 11:45 a.m. – 12:15 p.m. **Releases**
- Self Help Website for Qualified holders
 - New Statute
- 12:15 – 1:00 p.m. **Lunch (Provided)**
- 1:00 – 2:00 p.m. **Foreclosures**
- Checklist
 - Sales Procedures
 - Bankruptcy
- 2:00 – 2:30 p.m. **Public Trustee Reporting**
- Quarterly PT to BCC

Last Updated: Friday, January 27, 2023

- 2:30 – 3:00 p.m. **Break**
- 3:00 – 3:30 p.m. **Website, Email, and PT Guidelines**
- 3:30 – 5:00 p.m. **Q&A and Wrap-Up Round Table**

Tuesday, February 7

- 9:00 – 9:30 a.m. **TREASURER DAY 1**
Treasurer Calendar
- 9:30 – 9:45 a.m. **Mill Levy Certification**
- 9:45 – 10:15 a.m. **Abatements**
- Interest
 - Process
 - What information to send with refund
- 10:15 – 10:30 a.m. **Break**
- 10:30 – 11:00 a.m. **Tax Statements**
- SB25
 - Tax Due Dates
- 11:00 – 11:30 a.m. **Tax Collection & Disbursement**
- Statements online, electronic delivery, mail
 - SOT
 - PILT
 - Special School Disbursement
- 11:30 a.m. – Noon **Bankruptcy**
- What to do once you receive a notice
 - Pacer
 - Treasurer Processes
 - Tax lien sale
 - Deed
- 12:00 – 12:45 p.m. **Lunch (Provided)**

- 12:45 – 1:15 p.m. **Reporting Overview**
- Monthly Treasurer & semi-annual Treasurer
 - August Tax Roll Correction Report
 - What information is reported?
 - What statutorily is required to be published/headers?
 - State Reporting Process
 - Exemptions
 - Personal Property
 - Senior and Veteran
- 1:15 – 1:30 p.m. **Delinquent Notices**
- Statuary Requirements – the earlier the better!
- 1:30 – 1:45 p.m. **Special Assessments and SOT**
- 1:45 – 2:00 p.m. **Break**
- 2:00 – 2:15 p.m. **Delinquent Personal Property**
- Notice, collection, distraint
 - Using outside collection agency
- 2:15 – 2:45 p.m. **Mobile Homes**
- Notice, collection, distraint, Tax Lien and Treasurer Deed
 - Selling
 - Moving
 - Demolition
- 2:45 – 3:15 p.m. **Tax Lien Sale**
- Statute requirements
 - 1099 to investors
- 3:15 – 4:00 p.m. **Tax Liens and Treasurer Deeds – Start to Finish**
- Application
 - Research
 - Advertising
 - Redemption
 - Assignment
- 4:00 – 5:00 p.m. **Investments**
- Statutes
 - Policy
 - Ladder your investments

Wednesday, February 8

TREASURER DAY 2

9:00 – 9:30 a.m.

Office Policies

- Cash Handling Policy
- Checks and Balance
- NSF
- Tax Certs
- CORA

9:30 – 9:45 a.m.

Other Offices – Duties and Relationships

- Assessor
- Clerk & Recorder
- Finance
- HR

9:45 – 11:00 a.m.

Division & Districts

11:00 a.m.

End of Seminar