

NEWSLETTER

February 2021



PRESIDENT'S MESSAGE

Dear members,

Over the past few months, we have witnessed a great deal of political discord. While politics plays an inevitable role in the function of our institutions, we must always engage and embrace our moral compass. In her address to the inaugural crowd, Amanda Gorman stated, "Somehow we weathered and witnessed a nation that isn't broken, but simply unfinished... and, yes, we are far from polished, far from pristine, but that doesn't mean we are striving to form a union that is perfect. We are striving to forge our union with purpose. To compose a country committed to all cultures, colors, characters and conditions of man."

I took these words to heart. Most of us in this organization are civil servants, meaning that we serve the public for the greatest good. While perhaps an imperfect union, we can strive to ensure that people have food on their table, children are educated, and we are kind to our neighbors. It is not difficult to speak a kind word to a stranger. I want to encourage all of you to perform an act of kindness this month. It can be anonymous or not, but I guarantee you will make someone's day and that person will, in-kind, pass along the goodwill.

"Kindness begins with the understanding that we all struggle." – Charles Glassman

All best,

Jared Crawford, President CKY AGA

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THANKS
FOR PUTTING YOUR ❤️ INTO YOUR WORK!

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» UPCOMING EVENTS

UPCOMING MEETING

February 10, 2021

FREE For Members, \$5 for non-members

(Pay through GoToWebinar)

Upcoming AGA Programs

Date	Speaker	Topic	CPE Hours
February 10, 2021	Mark Schmitt & Dylan Schneider, MCMCPA's and Advisors	Tax Updates	1
March 10, 2021	Jessica Honican, Office of Income Taxation	From COVID Response to Tax Receipts	1

Note: If there's a topic or speaker you'd like, please reach out to the 2020—2021 Education Co-Chairs. Their contact information can be found on the last page of the newsletter.



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February Presenters

Mark Schmitt

CPA, Partner, Auto Dealer Services Team Leader

Mark Schmitt is the Partner in Charge of the Tax Department in the MCM Lexington office. He has more than 30 years of tax, audit, and business consulting experience for individuals and a variety of industries, including auto dealers, contractors, manufacturers, coal extractors, restaurants, and professionals. Mr. Schmitt also has more than 20 years of experience in governmental, not-for-profit, and tax credit audits. He has served as Engagement Partner on audits of housing authorities, including HUD and tax credit entities, public libraries, employee benefit plans, local governments, educational cooperatives, mortgage lenders, and numerous associations.



Dylan Schneider

CPA, Senior Tax Manager



Dylan Schneider has been with MCM since 2010. His areas of expertise include tax compliance, provisioning and planning for such niche industries as automotive dealerships, financial institutions, construction and contractors, and manufacturers.

March Presenters

Jessica Honican

Executive Director

Office of Income Taxation



Jessica S. Honican was appointed Executive Director of the Office of Income Taxation in August, 2020. Jessica graduated with a Bachelor of Science degree in accounting from the University of Kentucky and is a licensed certified public accountant (CPA). She has specialized in income tax throughout her career at the Department of Revenue working in a myriad of roles in the Office of Income Tax, the Division of Protest Resolution, and the Office of Tax Policy and Regulation. Most recently Jessica held the position of Director of the Division of Corporation Tax. She is actively involved in CASA of Lexington, is a member of the Kentucky Society of CPA, and an alumnus of the Leadership Central Kentucky Class of 2016-2017.



National Leadership Training

February 24-25 | Virtual Event
14 CPEs



NLT'21

NLT is 100% Virtual!

National Leadership Training (NLT) is the essential event for developing and training government financial professionals to excel as leaders in today's competitive market. Attend and share best practices, find solutions to persistent challenges, network with peers and learn from government and industry experts.

NLT will be held virtually, Feb. 24–25, 2021. This training offers up to 14 CPE hours.

Scholarships Are Available to Undergraduate and Graduate Students!

Applications for AGA's 2021 National Academic Scholarships program are now being accepted. The application period closes on **April 16**.

AGA CENTRAL KENTUCKY CHAPTER

December Secretary's Report

AGA Central Kentucky Chapter

Chapter Executive Committee

Meeting Minutes for meeting held: December 2, 2020

Members present on GoToMeeting: Jared Crawford, Phil Nally, Alice Wilson, Kristen Coffey, Michelle Sutton, Rachael Prestenbach, Ann Case, Kristen Hundley, and Jodi Correll.

1. Call to Order by Jared.
2. Regular Reports:
 - a. October Meeting minutes – Motion to approve – Alice, seconded by Kristen Coffey. Motion passed.
 - b. October Treasurer's report – Motion to approve – Kristen Coffey. Seconded by Ann. Motion passed.
 - c. Membership information – No new members. No Update
3. Old Business
 - a. Programs update
 - i. December 9: Sheila Wienberg, Founder and CEO, Truth in Accounting.
 - ii. January 13 – Rebecca Adkins, Executive Director of Operations will be presenting at our monthly PDT.
 - iii. February 10: Mark Schmitt and Dylan Schneider, Mountjoy Chilton Medley
 - b. Please provide at least one suggestion of a speaker/topic to Education committee by 12/15.
 - c. Internal controls document – Kristen provided her plans.
 - d. Reminder: Submit newsletter items by 15th of the month (Terra Coffey)
 - e. Updating web address to the National Platform
 - f. PDT updates: 178 attended; invoiced APA \$2,850; invoiced to OPA \$200; and net payout from Strip \$4,024.10; grand total of \$7,074.10; \$5,824.10 after speaker fees (\$1,250 to Daniel Porter for his fees)
 - g. Community Service fund Donation; \$25 to American Cancer Society in Lisa Parker's name; \$25 to Lexington Humane Society in Kinney Poynter's name.
 - h. Young Professionals Coordinator Krista will be providing names of schools to contact.
 - i. Invest in a one year Certificate of Deposit at CCU; 0.70% annually in the amount of \$20,000 – Motion to approve – Kristen Coffey, seconded by Alice Wilson. Motion passed.
 - j. Volunteers to review another chapter's CCR: Evie and Jared
 - k. Other
4. New Business
 - a. Holiday charitable contribution; donate this year to a food bank, specifically Kentucky. Donate \$250 - Motion to approve – Ann, seconded by Kristen Hundley. Motion passed.
 - b. Pulse Check-in sent to National
 - c. Spring Training
 - d. Remove hyperlinks to email addresses from website
 - e. Update website in accordance with Ace Award checklist
 - f. Other
5. Next meeting January 6, 2021 (11:30-12:30) GoToMeeting
6. Adjourn - Motion to approved – Jared Crawford, seconded by Ann Case

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December TREASURER'S REPORT

Find us on



Central Kentucky AGA

Treasurer's Report

Month Ended December 31, 2020

Reconciled Cash Balance as of 11/30/2020 \$ 30,497.48

General Receipts:

Monthly Program Fees - Cash	
Monthly Program Fees - PayPal	
Monthly Program Fees - Check	
Monthly Program Fees - STRIPE	22.75
Central KY Membership Dues	-
Interest Earned	1.50
	24.25

Education Receipts:

PDT Training Fees	2,850.00
PDT Training Fees - Paypal	-
	2,850.00

Total Receipts 2,874.25

Total Funds Available 33,371.73

Less: Expenses (21,610.00)

Checkbook Balance 12/31/2020 **\$ 11,761.73**

Less: Education Fund Balance

General Fund Balance 11/30/2020 **\$ 11,761.73**

General Expenses:

David Taylor - Monthly Website	85.00
Daniel Porter - Fall PDT Speaker	1,250.00
Feeding Kentucky	250.00
Truth in Accounting	25.00
Purchase of CD at CCU	20,000.00
	21,610.00

Wesbanco	-
CCU-Checking	11,756.73
CCU-Savings	5.00
	11,761.73



Central Kentucky AGA

Change in General Fund Balance

Month Ended December 31, 2020

General Fund Balance 11/30/2020 **\$ 30,497.48**

Transfer of Education Fund Balance

Monthly Receipts 2,874.25

General Expenses **21,610.00**

Net Increase (Decrease) in General Fund Balance **(18,735.75)**

General Fund Balance 11/30/2020 **\$ 11,761.73**

Central Kentucky AGA

Change in Education Fund Balance

Month Ended December 31, 2020

Education Fund Balance 09/30/2020 \$ -

Monthly Receipts \$ 2,850.00

Monthly Expenses \$ -

Transfer to General Fund

Net Increase (Decrease) in Education Fund Balance -

Education Fund Balance 12/31/2020 **\$ -**

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AGA news



To get involved and
volunteer



Submit future
Newsletter material



Visit our website at
[Central Kentucky AGA](http://CentralKentuckyAGA.org)

2020-2021 Chapter Executive Committee Members

President:	Jared Crawford
President-elect:	Alice Wilson
Immediate Past President:	Krista Jackson
Treasurer:	Elizabeth Smith
Secretary:	Ann Case
Education Co-Chair:	Eveanna Barry
Education Co-Chair:	Kristen Coffey
Education Co-Chair:	Michelle Sutton
Membership/Attendance:	Catherine Hunt, CGFM
Historian:	Rachel Prestenbach
Newsletter Editor:	Terra Coffey
Co-Webmaster:	Amy Small, CGFM
Co-Webmaster:	Joe McDaniel
Accountability (CCR):	Kristen Hundley
CGFM:	Melissa Klink
Young Professionals:	Jetta Collett
Community Service Co-Chair:	Jodi Correll
Community Service Co-Chair:	Phil Nally, CGFM
Chapter Travel Coordinator:	Terra Coffey
National Council of Chapters	
Representative:	Phil Nally

Are you looking to build your professional networking skills? Do you have a passion for AGA and want to share it with others? If so, contact a current Committee Member!