

# AGA Phoenix Chapter (www.agaphoenix.org)

PY 2017-2018

February 2018



## Message From the President



The Chapter is off to a good start for 2018 with two January events and two February events.

The first February event will be on February 7<sup>th</sup> at ASU Skysong. The speaker, Lealan Miller of Eide Bailly, LLP, will present on Fraud Awareness- A Hands on Interactive Session- How Much Do We Really Know? The second meeting is our traditional event

on ASRS and Tax Updates for four (4) CPEs. The date of the event is Friday, Feb 16<sup>th</sup> at Skysong.

We have a lot of new members joining the Chapter. I would like to welcome you and to let you know that we have a number of board positions open that need to be filled, such as: Webmaster chair, Program chair, CGFM chair and Newsletter chair. If you are interested in serving on the board, please let us know by contacting us at e-mail: [board@agaphoenix.org](mailto:board@agaphoenix.org) . Also, please reach out to us at this e-mail if you have ideas on topics or if you have any feedback for us.

Thank you for supporting the Phoenix Chapter!

Gergana Kovatcheva, CPA, CGFM

President

AGA Phoenix Chapter

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### CGFM Resources Available:

For AGA members interested in taking the CGFM please contact our CGFM chair at [contact@agaphoenix.org](mailto:contact@agaphoenix.org) for more information.

AGA Phoenix has study guides available for member check-out. Check here for availability:

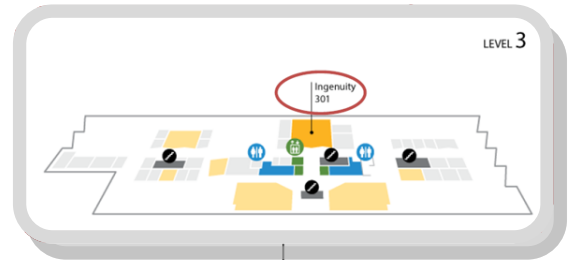
<https://www.agacgfm.org/Chapters/Phoenix/CGFM-Certification/CGFM-Study-Materials.aspx>



**2/7/18 Meeting (2 CPE)**  
**Topic: Fraud Awareness—How much do you really know?**  
 Lunch (11:30 AM)  
 Education Event (12:00 PM—1:50 PM)



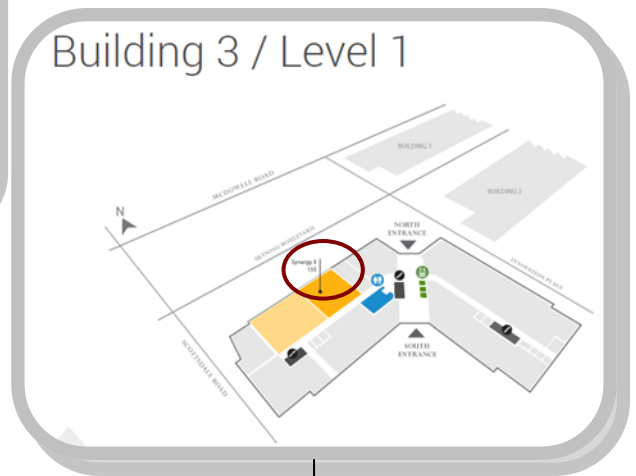
**Sky Song 1475 N Scottsdale Rd., Bldg 1, Ingenuity Room 301, Scottsdale, AZ 85257**



**2/16/18 Meeting (4 CPE)**  
**Topic: Tax Update**  
 Lunch (11:30 AM)  
 Education Event (12:00 PM—3:30 PM)



**Bldg 3, Synergy II Room 135**



**Association of Government Accountants  
Phoenix Chapter  
Education and Meeting Plan  
2017-2018 Program Year**

Date	Event	Topic	CPE Credit	Registration Dead-line	Location
9/13/17	Chapter Meeting-Lunch 10:30am-11:00am, Seminar 11:00am-12:50pm	Advanced Excel presented by Gregory Cleveland	2	9/8/17	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
10/11/17	Chapter Meeting-Lunch 10:30am-11:00am, Audio Conference 11:00am-12:50pm	Internal Control	2	10/6/17	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
11/15/17	Chapter Meeting-Lunch 11:30am-12:00pm, Seminar 12:00pm-1:50pm	"Who's On Your Bench?" - Tips for Succession Planning presented by Pat Childress	2	11/10/17	AZ Department of Education Room 312 1535 W Jefferson St. Scottsdale, AZ 85007
12/6/17	Chapter Meeting-Lunch 11:30am-12:00pm, Seminar 12:00pm-1:50pm	Holiday Social—Cost Allocation presented by Donna Sandoval	2	12/1/17	ASU Skysong Bldg. 3, Synergy II #135 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
1/10/18	Chapter Meeting-Lunch 11:30am-12:00pm, Audio Conference 12:00pm-1:50pm	Grants Management	2	1/5/18	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
1/19/18*	8:00am-8:30am Continental Breakfast 8:30am-12:00pm Class	Ethics—ASCPA	4	1/12/18	MCCCD Governing Bd Rm 2411 W. 14th Street, 2nd Floor Tempe, AZ 85281
2/7/18	Chapter Meeting-Lunch 11:30am-12:00pm, Seminar 12:00pm-1:50pm	Fraud Awareness—How much do you really know?	2	2/2/18	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
2/16/18*	Chapter Meeting-Lunch 11:30am-12:00pm, Seminar 12:00p-12:50pm	ASRS	1	2/9/18	ASU Skysong Bldg. 3, Synergy II #135 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
	1:00pm-1:50pm	Deferred Comp	1		
	1:50pm-2:40pm	Federal Tax Update	1		
	2:40pm-3:30pm	State Tax Update	1		
	Total		4		
3/7/18	Chapter Meeting-Lunch 11:30am-12:00pm, Audio Conference 12:00pm-1:50pm	Infrastructure Financing	2	3/2/18	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257

**Association of Government Accountants  
Phoenix Chapter  
Education and Meeting Plan  
2017-2018 Program Year**

Date	Event	Topic	CPE Credit	Registration Deadline	Location
3/28/18	Chapter Meeting-Lunch 10:30am-11:00am, Audio Conference 11:00am-12:50pm	Cybersecurity	2	3/23/18	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
4/11/18	Chapter Meeting-Lunch 10:30am-11:00am, Seminar 11:00am-12:50pm	Lisa Grace (ASU)	2	4/6/18	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
4/27/18*	8:00am-4:00pm PDT	AGA President	1	4/20/18	Rio Salado College 2323 W. 14th St. Tempe, AZ 85281
			1		
		State Treasurer—DeWit	1		
		GASB Updates	2		
		SAS Updates	1		
			2		
		Total	8		
5/16/18	Chapter Meeting-Lunch 10:30am-11:00am, Audio Conference 11:00am-12:50pm	Fraud Data Analytics	2	5/11/18	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
6/13/18	Chapter Meeting-Lunch 10:30am-11:00am, Seminar 11:00am-12:50pm	Leadership	2	6/8/18	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
			36		

\*These events are not monthly chapter meetings and will be at an additional cost. Details will be provided in future newsletters and/or on the Calendar of Events page on our website.

**Prospective members are welcome to learn more about us by attending a monthly chapter meeting. Registration per monthly chapter meeting date, which includes lunch, is as follows:**

**Members:**

\$25 each monthly chapter meeting, or package deal—\$220 for all sessions\*

**Non-Members**

\$40 each monthly chapter meeting

\*excludes special events (Ethics, Tax Update and Professional Development Training—PDT)

To RSVP, please go to our online registration site: <http://agaphoenix.eventbrite.com> . Thank you for your interest!

## Goals for 2017-2018 and Beyond

- Membership & Education:
  - Provide 36 education credits throughout the program year. Audio conferences and live speakers.
  - Reach out to new members within first month of membership.
  - Reach out to all non-renewing members in May/June.
  - Provide social/recruiting event in Spring.
- Accountability:
  - ✓ • Prepare chapter’s Citizen Centric Report (CCR) by September 30, 2017 and post to website.
  - ✓ • Submit chapter’s CCR to AGA’s Certificate of Excellence Review Program.
- CGFM Goals:
  - ✓ • Continue reimbursements for chapter members who pass all three sessions of the CGFM tests. Reimbursement includes the cost of the three exams and application fee.
  - Communicate and promote CGFM designation to Chapter members .
  - ✓ • Provide CGFM study guides to members on a first come first serve basis.
  - Seek State proclamation for March as CGFM month and provide recognition to CGFM members.
  - ✓ • Hold CGFM Review Course in October 2017
- Young Professionals:
  - ✓ • Reach out to college accounting clubs to present about jobs in governmental accounting and discuss what AGA is and how it can impact students’ careers.
  - Annually award up to two scholarships for students enrolled in an Accounting, Finance or Public Administration curriculum.

PY 2017-2018 Budget through Nov 2017		
Budget Category	Budget \$	Spent @
Education	\$21,250	\$3,926.10
Membership	\$1,000	\$0
Travel	\$3,500	\$0
Board Expenses	\$1,000	\$223.42
Scholarship	\$1,500	\$0
CGFM	\$1,000	\$15,265.08
Community Service	\$750	\$0
Website	\$150	\$0
Early Career	\$100	\$100.00
Audit	\$100	\$100.00
Misc.	\$100	\$0
<b>Total</b>	<b>\$30,450</b>	<b>\$19,614.60</b>

### PY 2017-2018 Committee Members:

- Membership – Mary Adelman
- Education – Keith Orr, Jerry Snyder, John Schutter, Anthony St. George
- Programs – Michelle Huckabay
- Accountability—Kim Prendergast
- CGFM – Gergana Kovatcheva
- Young Professionals / Early Career – Jessica Leal
- Scholarship – Kelly Alkhoury
- Community Service – John Schutter
- Website/Newsletter – Michelle Huckabay

# AGA Phoenix Chapter, Treasurer's Reports - December 2017

## Treasurer's Report

Book Balance 11/30/2017	\$5,553.28
Receipts	\$1,567.98
Disbursements	\$805.06
	<hr/>
Book Balance 12/31/17	\$6,316.20
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Outstanding Checks	\$0.00
Outstanding Deposits	\$0.00
Adjusted Book Balance	\$6,316.20
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<u>Account Balance</u>	
Cash on Hand	\$50.00
Savings Balance	\$5.00
Your Savings Balance	\$5.00
Money Market Account	\$0.00
Checking Balance	\$241.52
Checking Balance	\$6,014.68
	<hr/>
	\$6,316.20
Difference Adjusted Book vs Bank	(\$0.00)

## Balance Sheet

12/31/2017

Cash and Bank Accounts	
Cash on Hand	\$50.00
Savings Balance	\$5.00
Your Savings Balance	\$5.00
Money Market Fund	\$0.00
Checking Balance	\$241.52
Checking Balance	\$6,014.68
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<b>TOTAL Cash and Bank Accounts</b>	<b>\$6,316.20</b>
Inventory	0.00
	<hr/>
Speaker Gifts	\$25.00
	<hr/>
<b>TOTAL ASSETS</b>	<b>\$6,341.20</b>
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<b>TOTAL Liabilities</b>	<b>\$0.00</b>
	<hr/>
<b>TOTAL Equity</b>	<b>\$6,341.20</b>
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# Announcements - Job Postings

**Accounting Intern—Arizona Department of Administration. \$18/hour.** Gain valuable, marketable skills in the workforce, before graduation, by participating in this internship. Objectives of internship include:

- Gain and understanding of government fund accounting and the application of Government Accounting Standards Board (GASB) principles while engaged in the preparation of accrual basis financial statements for internal service funds.
- Understand the State of Arizona banking process, while assisting with reconciliation efforts for Health Insurance Trust Fund (HITF) Non-sufficient funds (NSF) activity and electronic funds transfers (EFT) coming through our Treasury Department.

**Ideal Candidate:** A Junior or Senior at an accredited 4-year College or University with a focus in accounting, and have completed their intermediate accounting coursework. The ideal candidate should maintain a GPA of 3.0 or better. Candidate must have the unrestricted right to work in the US without requiring sponsorship.

**Apply through website:** [www.azstatejobs.gov](http://www.azstatejobs.gov)

**Internal Auditor Senior—Maricopa County. \$59,238.40-\$64,064.00/year.** The Internal Auditor Senior provides objective information on the County's system of internal controls to the Board of Supervisors so they can make informed decisions and protect the interest of the County citizens:

**Minimum Requirements:** Bachelor's degree in Accounting, Finance, Business Administration, Management, or closely related field, and three (3) years of professional auditing experience.

**Preferred Education and/or Experience:** Master's degree in related field. Experience in internal auditing. Experience leading and/or supervising audits from beginning to end. Experience developing written audit reports and making formal presentations of audit findings and recommendations to clients and management.

**Apply through website (job # 230IASS011918):** <https://jobs.maricopa.gov>

Would you like to post your organization's job postings on our website?

Please email AGA Phoenix Webmaster, [michelle@agaphoenix.org](mailto:michelle@agaphoenix.org)

# AGA Phoenix Chapter Executive Board Program Year 2017-2018

**PURPOSE:** Consists of chapter officers, past president, committee chairs, and other members appointed by the chapter president. Responsible for all chapter business and planning.

**OFFICERS:**

President	Gergana Kovatcheva, CGFM, CPA
President Elect	Michelle Huckabay, CGFM, CPA
Past President	Josh Consier
Secretary	Kim Prendergast, CGFM, CIA, CPA, CFE
Treasurer	Anthony St. George (appointed to complete Josh Neidigh's term)

**ADDRESS:** AGA Phoenix Chapter, PO Box 64911  
Phoenix, AZ 85082-4911

**PHONE:** (480) 731-8582      **FAX:** (480) 731-8560

**EMAIL:** [contact@agaphoenix.org](mailto:contact@agaphoenix.org)

## Our Purpose

### Mission Statement

AGA Phoenix Chapter serves Arizona professionals in the government financial management community by providing quality, low-cost continuing education, promoting professional development and interaction among members, and fostering a commitment to community involvement as well as a sense of responsibility for advancing government accountability.

### Vision

AGA Phoenix Chapter actively creates an avenue for membership to share ideas with each other, to share knowledge and time with the community, and to promote the advancement of government standards and accountability within the profession.

## We'd Love Your Input!

Please remember to send in any articles of interest, including any that you may have written on the subjects of management, accounting, or auditing. We welcome your comments and suggestions.

In addition, please send us any special announcements in relation to promotions, marriages, births, anniversaries, certifications achieved, or any other significant event for any of our chapter members. Any article submitted by the second week of the month will be included in the next month's newsletter.

Please email your news for forthcoming newsletters to:

[contact@agaphoenix.org](mailto:contact@agaphoenix.org)







## Check out AGA's Free Toolkits & Guides:

- Sub-recipient vs. Contractor Checklist
- Blended and Braided Funding
- Leveraging Government Resources in Challenging Financial Times
- Risk Assessment Monitoring Toolkit
- Cooperative Audit Resolution and Oversight Initiative
- Fraud Prevention Toolkit
- Candidate Assessment Toolkit for Grant Managers
- How Federal, State and Non-Profit Collaboration Improved Efficiencies in Delinquent Debt Collection
- Citizen Centric Report: How To

<https://www.agacgfm.org/Resources/Tools-To.aspx>

## Membership Referral Program

Did you know that you can gain \$50 if you get two individuals who are not currently members to join our chapter? All you have to do is have them put your name down on the sponsor section of the membership form.

It is always nice to have new faces become members to our growing organization!

## Board Members Wanted

If you are interested in volunteering for a committee and to be on the Board, please contact AGA at the following e-mail: [contact@agaphoenix.org](mailto:contact@agaphoenix.org)

# We Are Always Looking For People Interested In Joining Our Organization

*NOTE: Excerpts and links below are from AGA's national website at [www.agacgfm.org](http://www.agacgfm.org).*

### What is AGA?

Briefly, AGA has been serving the government financial management profession for over 50 years As a not-for-profit educational organization, AGA serves the professional interests of financial managers from the local, state and the federal governments, as well as public accounting firms, responsible for effectively using billions of dollars and other monetary resources everyday. Members are accountants, auditors, contract, financial and performance, budget analysts, chief financial officers, information systems managers, finance directors, inspectors

general, professors, students. Membership in AGA is like tapping into a reservoir of actual real-world knowledge and experience of government financial management experts.

### Benefits of Joining

If you asked a member which of the benefits they value the most, they probably would say education and networking, which often occur at the same time and place. Here are some of our members' favorites:  
Continuing Professional Education and Networking Opportunities  
Keep Up-to-Date on Current Issues  
Keep Abreast of the Latest Technologies and Financial Systems  
Professional Guidance and Certification

### How Can You Join?

Click the links below to access the Membership Application and to find out membership types and dues.



Click <https://www.agacgfm.org/Membership/Learn-About-AGA/Join-or-Renew.aspx>

**to complete the online AGA Membership Application.**

**\*\*Did an AGA member inspire you to join? Don't forget to enter your AGA Sponsor's Name and Member ID on the application.\*\***