



The Washington Connection



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Up Next!

2023 ASMC/AGA Annual Golf Tournament - Friday, July 21st, 8AM, at Ft. Belvoir's Woodlawn & Gunston Golf Courses. [Register here!](#)

AGA's Professional Development Training (PDT) - July 23-26, 2023 in Orlando, Florida. AGA's PDT brings together a broad audience of federal, state and local government financial professionals. PDT offers educational sessions over four days of training. [Register here!](#)

Hope You're Enjoying Your Summer!

THANK YOU for your engagement this **2022 - 2023** season.

We look forward to seeing you soon!

President's Message

It's hard to believe that this is the last newsletter of this year and of my presidency! Our chapter had a great year and I'm very proud of the wonderful opportunities offered to our chapter members, along with the high levels of participation. I would be remiss if I didn't start this newsletter off with a huge thank you to our Chapter's Officers, Directors, Board Members, and Volunteers. I would also like to thank our corporate sponsors for their continued support of our chapter. The number of volunteers that dedicate their time and energy to make our events possible is truly inspiring. It has been my pleasure to work with this leadership team and I look forward to continuing to support the Chapter as the Past-President.

It's also been wonderful to meet so many of our members at events this year. Highlights from this year include:

- Eight (8) Monthly Luncheons with fantastic speakers
- Access to AGA National Webinars
- Fun and engaging Member Services events, including trips to see the Wizards and the Nationals, and our Annual Wine Tour
- VIP Sponsorship events



- Career-supporting mentorship events
- Volunteer opportunities
- CGFM Support
- New member recognition

While I'm sad to see my presidency end, I'm very excited to hand the reins to Lal Harter as he takes over in July. Thank you again to all of our volunteers and members for a great year. I hope everyone has a wonderful summer!

Sincerely,

Caitlin Holmes McGurn, President
AGA Washington DC Chapter

Vision

AGA is the premier association for advancing government accountability. AGA defines government accountability as a government's obligation to the people for its actions and use of resources.

Mission Statement

AGA fosters learning, certification, leadership and collaboration for professionals and stakeholders committed to advancing government accountability.

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National Council of Chapters Meeting

April NCC Meeting Summary

By Paul Marshall, DC Chapter NCC Representative

In April, DC Chapter leaders Paul Marshall, Sponsorship Director and National Council of Chapters (NCC) representative, and Mona Amatie, DC Chapter Treasurer Elect, attended LEAD! 2023 held in Baltimore, Maryland. LEAD! is AGA's annual leadership training event for chapters that covers AGA's national direction, initiatives, expectations of leaders, areas for improvement and insight into how to access AGA resources. Additionally, it's an opportunity to meet the National Governing Board Directors, Nick Garrard for our region – Region 8, and representatives from chapters across the country. The quarterly NCC meeting was also held at LEAD! this year.

Some highlights from LEAD! and the NCC meeting are included below:



- **Chapter Leadership:** We discussed best practices for Chapter leadership, including establishing a Chapter Executive Committee (CEC) made up of:
 - The CEC supports administration including upkeep of 501(C)(3) status, chapter bylaws, chapter incorporation and insurance.
- **Governance Structure:** AGA is run by the National Governing Board and support by several councils as shown below:



April NCC Meeting Summary cont'd.

- **Membership:** We are encouraged to find new members and share not only the benefits of membership, but activities members can participate in such as:
 - Mentor/Mentee relationships
 - Get published in the AGA Journal
 - Speak at an in-person event or webinar
 - Volunteer as a chapter leader
 - Support community service activities
- **ACE:** The group discussed ways to help chapters meet the goals of the Achievements in Chapter Excellence (ACE) program. Chapters should assign an individual to keep track of chapter achievements and update ACE periodically throughout the year. At least quarterly, this progress should be shared with the CEC to make sure the chapter is meeting its goals. Chapters were also reminded that they should have an annual evaluation or audit of their financials to ensure accurate accounting practices and appropriate internal controls over chapter funds.
- **Resources:** Chapter leaders should refer to [Chapter Resources](#) on AGA's website to find great templates and guidance for:
 - ACE
 - Administrative & Operations (including rebranding)
 - CGFM
 - Communications & Marketing (including new logos)
 - Community Service
 - Education & Meetings
 - Membership
 - Virtual Meetings & Events
 - Young Professionals, Colleges & Universities
- **Leadership Panel:** At the end of the first day, LEAD! held a leadership panel, including DC Chapter attendee Paul Marshall. Some of the highlights from the panel were:
 - What advice would you give the CEC on recruiting new volunteers?
 - Find enthusiastic people, people that follow through, preferably people that have been members for a new year and understand the responsibilities of the board, allow people to rotate positions, and give people a chance to be a leader – you'll often be surprised by people's capabilities.
 - How has serving on a committee helped you in your career?
 - It has had a direct influence, it builds your network, helps you meet leaders in the profession, serve with them side by side, and provides leadership opportunities.
 - How did you learn what was required for the job (committee position)?
 - I think the best approach is akin to an apprenticeship. Learn on the job, use trackers and to-do lists, shadow the committee Director, ask plenty of questions and don't be afraid to share new ideas!



Paul Marshall spoke at this year's LEAD! leadership panel!

LEAD!
2023

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AGA DC 63rd Annual Awards Gala

JW Marriott, Washington DC, May 20, 2023

Our Chapter celebrated another successful program year as more than 100 volunteers, members, sponsors, and guests gathered at the JW Marriott in Washington, DC on the night of May 20, 2023. We held the awards ceremony to recognize and congratulate our outstanding volunteers for their continuous contributions to our chapter.

- **President's Award:** Brittany Hopwood, Annual Training Program Director
- **President's Award:** Alexis Alfaro-Trejo, Monthly Luncheon (Virtual Operation)
- **Engagement Champion Award:** Dan Lange, Monthly Luncheon (Live Operation)
- **Presenter Award:** Matt Gorman, Monthly Luncheon (Virtual Operation)
- **Most Active Member Award:** Paul Lionikis, Monthly Luncheon (Program) and Senior Advisor
- **Facilitator Impact Award:** Bo Shevchik, Monthly Luncheon (Program)

We are grateful to provide our members the opportunity to connect in person and celebrate our chapter's achievement made during this program year. Our Awards Gala could not be made possible without all the hard work of the Awards Gala Committee. THANK YOU to the Awards Gala Committee Director, Cherry Ung, as well as Orinda Basha, Leslie Phillips, and Catherine Gao.



Chapter President Caitlin Holmes McGurn via recorded welcome.

AGA Annual Awards Gala cont'd.



Cherry Ung (left - Awards Gala Committee Director) & Orinda Basha (Awards Gala Committee member)



Catherine Gao (left - Awards Committee Director) & Leslie Phillips (Awards Gala Committee member)

AGA Annual Awards Gala cont'd.



**Cherry Ung (Awards Gala
Committee Director)**

AGA Annual Awards Gala cont'd.



AGA Annual Awards Gala cont'd.



Paul Lionikis (Past Chapter President 2020-21) hosted the awards ceremony.

AGA Annual Awards Gala cont'd.



Lal Harter (Chapter President-Elect) presented President's Award to Brittany Hopwood



Catherine Gao announced Engagement Champion Award winner Dan Lange



Lal Harter presented Presenter Award to Matt Gorman (right)



Lal Harter accepted President's Award on behalf of Alexis Alfaro-Trejo

AGA Annual Awards Gala cont'd.



Catherine Gao announced Facilitator Impact Award Bo Shevchik



Lal Harter presented Most Active Member Award to Paul Lionikis (left)



President Gavel exchange from Paul Lionikis (on behalf of Caitlin Holmes McGurn) to Lal Harter



Past DC Chapter Presidents (from left): Salim Mawani, Virginia Robinson, Christy Beck, Evelyn Brown, Wendy Morton-Huddleston, Paul Lionikis

AGA Annual Awards Gala cont'd.



DC Chapter members more than 25 years



DC Chapter Current Board Members

AGA Annual Awards Gala cont'd.



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AGA DC Chapter Monthly Luncheon

April 2023 Hybrid Luncheon

“Evolving Enterprise Risk Management at USAID”

On April 19, 2023, the DC Chapter welcomed our April hybrid luncheon speakers, **Mr. Reginald W. Mitchell, Chief Financial Officer (CFO), from the U.S. Agency for International Development (USAID)** and **Ms. Lydia Nylander, USAID Enterprise Risk Management and Internal Controls Division Director**. We are grateful for the 170 in-person and virtual attendees who joined us at Clyde's of Gallery Place in downtown Washington, DC.

Mr. Mitchell and Ms. Nylander shared their experience on implementing and working with OMB Circular A-123 “Management’s Responsibility for Enterprise Risk Management and Internal Control” especially as it relates to Enterprise Risk Management (ERM). Updated in 2016, the Circular required that federal agencies integrate ERM with their internal control systems. Of particular interest is the notion of “risk” as it applies to USAID and, consequently, it must manage risk differently because of its mission to promote democracy and eradicate poverty by working with foreign nationals.

The agency can trace its roots back to the Marshall Plan of 1948 in which the United States transferred billions in economic recovery programs to Western European economies after the end of World War II. USAID was founded by President John Kennedy in November 1961.

Key aspects shared by Mr. Mitchell and Ms. Nylander included:

- USAID’s definition of risk is the “effect of uncertainty on the Agency’ objectives.”
- Risk can present opportunities—not just negative outcomes—that can enhance the likelihood of achieving a set of objectives.
- Risk must be weighed against performance, cost, and short- and long-term benefits.
- ERM is a holistic, agency-wide approach to managing risk that addresses the full spectrum of threats as



Reginald W. Mitchell
USAID CFO



Lydia Nylander
USAID ERM & Internal Controls Division Director



(Right to Left) Mike Bolin, Lydia Nylander, Reginald Mitchell

April Luncheon cont'd.

an interrelated risk portfolio rather than examining risks in discrete silos.

- USAID conducted a review and revision of the agency’s Risk Appetite Statement (RAS) in 2022 and rolled out a webinar series to socialize RAS across the agency. This was promoted through outreach, surveys, and task forces because USAID has a workforce of over 9,000 employees.
- The RAS helps the agency be more confident in assuming appropriate levels of risk to achieve strategic objectives.
- USAID’s Overall Risk Appetite by Category ranges from low (Legal and Security) to high (Programmatic/ Development Outcomes).

The presentation ended with a robust Q&A session (as usual!) led by Bo Shevchik and Frank Petersen. The USAID officials noted that some of the biggest agency challenges lie with repatriation and “extraction.” These factors must be input into the risk profile. Moreover, ERM at USAID is designed not to micromanage leadership but to advise management of the risks facing the agency.

USAID has a “zero” tolerance for waste, fraud, and abuse. When Mr. Mitchell hears the refrain from implementing partner countries that black market activities should be weighed against “saving lives,” USAID’s position is still the same; namely, “zero” tolerance.



Luncheon Speaker Ms. Lydia Nylander



Luncheon Speaker Mr. Reginald Mitchell



Mike Bolin, SVP, PNC Bank



We would like to thank our corporate sponsor, **PNC Bank**, and **Mike Bolin, Senior Vice President**, for his introductory remarks.

Finally, our luncheon was made possible by our hard-working volunteers from the Monthly Luncheon Team who took care of the programming, in-person, and virtual operations.

THANK YOU to the TEAM!!

April Luncheon cont'd.

Speakers' Biographies

Reginald W. Mitchell is the USAID CFO responsible for the oversight of the accounting and financial reporting functions of the agency. This includes the oversight and development of USAID worldwide financial management policies, programs, and systems in support of the agency's development activities. Mr. Mitchell directs the daily operations of the CFO organization and provides technical financial leadership for USAID's worldwide controller network and for Washington operating units in executing the agency's approximately 9,000 FTE and \$25 billion dollar financial portfolio.

Prior to joining USAID, Mr. Mitchell served 26 years with the U.S. Nuclear Regulatory Commission (NRC) during which time he held several senior executive financial positions to include the Controller responsible for the agency's fiscal policies, proprietary accounting activities, and the development and maintenance of the agency's core and mixed financial systems. He also served as the Budget Director responsible for the agency's budgetary accounting activities, including the formulation and execution of the agency's program and operating expense budgets.

Prior to joining the NRC, Mr. Mitchell served in the United States Navy on nuclear submarines. Mr. Mitchell received his Bachelor of Science degree in Business Management from National-Louis University and his Master of Public Administration from American University. He is a long-standing member of the Association of Government Accountants and Senior Executive Association.

Lydia Nylander is the Enterprise Risk Manager at USAID's Government to Government Risk Management Team in the Office of the Chief Financial Officer (M/CFO), leading cross functional teams providing technical advice and policy guidance on projects with national, sub-national and sector-level impact related to sustainability and country ownership and management of critical risks at the Agency level.

Prior to USAID, Ms. Nylander assumed senior community engagement roles at the Federal Deposit Insurance Corporation (FDIC) and oversaw program and policy development at the Community Oriented Policing Service at the US Department of Justice. Ms. Nylander is the former Director of Partnerships and Resource Development at the National Association of Consumer Advocates – the nation's leading consumer advocacy organization. In this capacity, she oversaw the Institute for Foreclosure Legal Assistance \$15 million dollar foreclosure defense project which provided legal representation to families facing foreclosure due to abusive subprime mortgages.

Ms. Nylander is the former Commissioner of the DC Mayor's Office on African Affairs and is a founding board Member of Trade plus Impact, a global platform supporting African female entrepreneurs in the craft and natural cosmetic sectors. She gained her Bachelor of Law at the University of London, and has a Masters in International and Comparative Law from the George Washington University Law School and is a 2018 Fellow of the International Career Advancement Program sponsored by the Josef Korbel School of International Studies at the University of Denver and the Aspen Institute.

Member Luncheon Videos

To access past recordings of our luncheon speaker presentations, please visit our chapter website and select the menu section "**Members Luncheon Videos**" or at this [direct link](#).

Please Note: Login and password are the same as your access to the AGA National website

AGA DC Chapter Monthly Luncheon

May 2023 Hybrid Luncheon

“NASA Financial Management – Foundation for Inspiration!”

On May 17, 2023, the DC Chapter welcomed our May hybrid luncheon speaker, **Ms. Margaret Vo Schaus, Chief Financial Officer (CFO) from the National Aeronautics and Space Administration (NASA)**. Our chapter is grateful for our 206 virtual and in-person attendees who joined us at Clyde's of Gallery Places in downtown Washington, DC!

Ms. Schaus built her presentation on diversity and reflected on the fact that, as a Vietnamese refugee with strong family bonds and with the assistance of a sponsor family in the US, she was able to embark upon a highly successful career. With that as background and with May having been designated as “Asian American, Native Hawaiian, and Pacific Islander Heritage Month,” Ms. Schaus reflected on the value of diversity, innovation, and financial management.

Key aspects shared by Ms. Schaus included:

- NASA has been rated as the #1 place to work in the federal government.
- The agency has a \$25 billion annual budget supported by 53,000 employees and contractors focused on aeronautics, space flight, STEM, and mission delivery.
- The CFO’s vision is to provide expert financial stewardship and oversight to enable success.
- None of this would have been possible without a diverse and multi-talented workforce.
- Having worked in financial management at several agencies such as GAO, DoD, Energy, and the Bureau of the Fiscal Service, the experience enabled Ms. Schaus to branch out, pursue challenges, and provide career growth.
- Financial managers need to focus on:
 - Data transparency and accountability;
 - Adaptability and resilience; and
 - Collaboration and teamwork.

During the presentation, Frank Petersen (NASA Deputy CFO – Finance and member of the luncheon program team) brought a lively touch to his polling questions which focused on women of Asian American, Native



Luncheon Speaker Margaret Schaus, NASA CFO



Isiah Bell (Corporate Sponsor Representative) and Margaret Schaus (NASA CFO)

May Luncheon cont'd.

Hawaiian, and Pacific Islander heritage. When asked during the Q&A session about what additional assets NASA could use, Ms. Schaus found it ironic that NASA could send rockets to the moon but found it challenging to automate traditional “bread and butter” tasks which could be enhanced with software and automation. This is symptomatic throughout the government. In responding to an inquiry about starting a career in financial management, Ms. Schaus reiterated that a tapestry of disciplines is helpful along with pursuing other challenges and diversifying one’s talents.



Chi Okonkwo and Margaret Schaus



Lal Harter (left), Frank Petersen (center), Paul Marshall

May Luncheon cont'd.



NASA CFO and Monthly Luncheon Program Team (from left): Shepherd Brown, Peter Moore, Bo Shevchik, Margaret Schaus, Paul Lionikis, Frank Petersen



Frank Petersen (left), student attendee guest, Margaret Schaus (right)



Margaret Schaus (center), Frank Petersen (far right), and NASA OCFO Team



Isiah Bell, VP, JPMorgan

We would like to thank our corporate sponsor, **JPMorgan Chase & Co.**, and **Isiah Bell, Vice President**, for his introductory remarks.

Lastly, our luncheon was made possible by our hard-working volunteers from the Monthly Luncheon Team who took care of the programming, in-person, and virtual operations.

THANK YOU to our monthly luncheon team for their time and efforts made throughout this program year!!

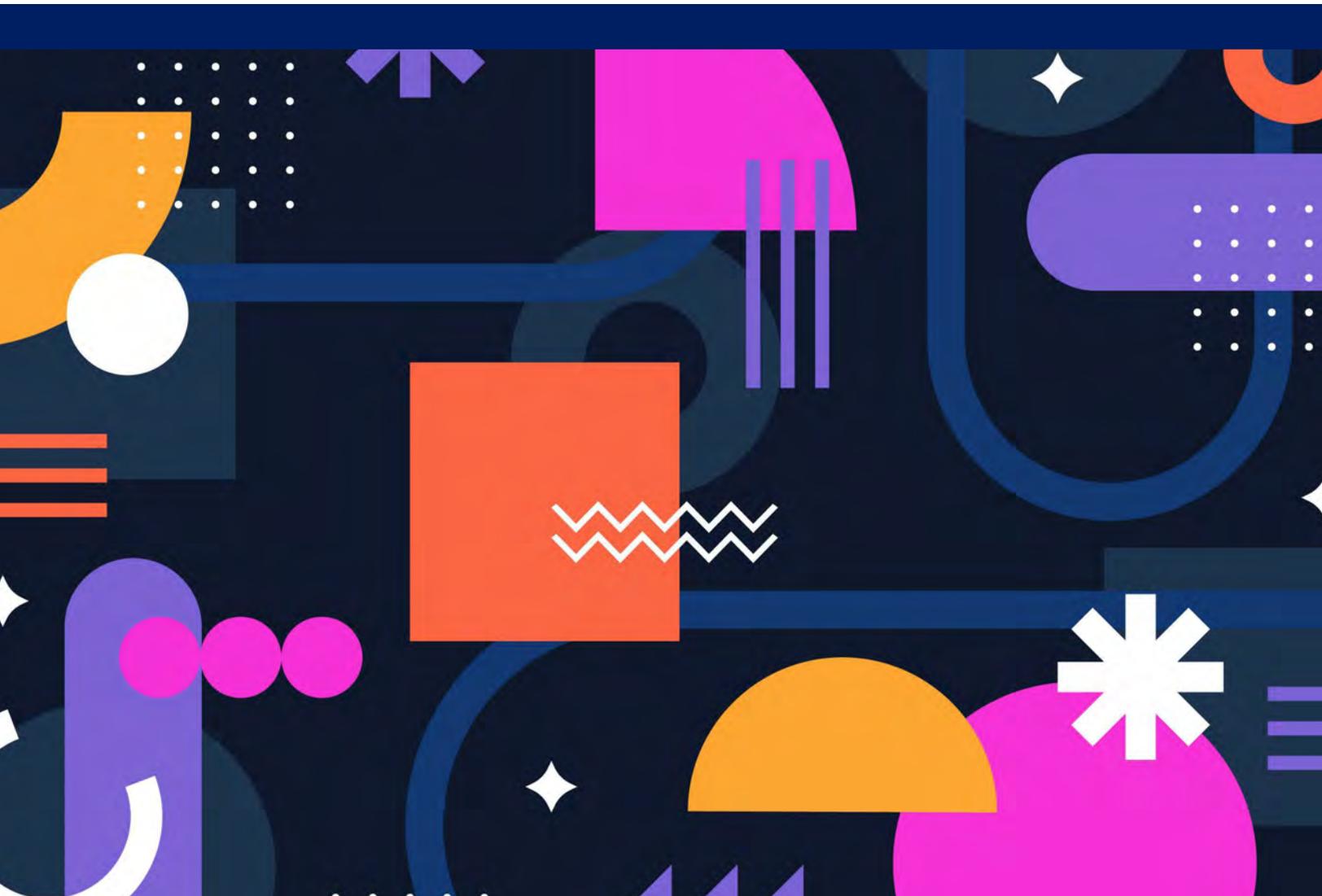
May Luncheon cont'd.

Speaker's Biography

As NASA's CFO, **Margaret Vo Schaus** ensures the financial health of the Agency and oversees all financial management, budget, strategic planning, and performance activities relating to NASA's programs and operations. Schaus manages the Agency's budget and financial operations, directs the preparation and submission of annual financial and budgetary reports, and coordinates Agency financial management activities with other federal agencies.

Prior to her appointment, Schaus was a career member of the Senior Executive Service. She has held numerous leadership roles within science and engineering organizations with responsibility for advancing research, development and demonstration programs; financial management; and business operations. She has served in positions at the Departments of Defense, Energy, and Treasury, and at GAO. Schaus has been recognized with several awards, including the Office of the Secretary of Defense Exceptional Civilian Service Award, the Department of Energy's Distinguished Career Service Award, and the Secretary of Energy's Honor Award.

She received her Bachelor of Arts degrees from Stanford University in Science, Technology, and Society, as well as English. She also holds a Master of Science degree in Management Science and Engineering from Stanford.



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Member Spotlight

Frank E. Petersen III, CGFM

*Deputy Chief Financial Officer – Finance,
National Aeronautics and Space Administration
(NASA)*

AGA-DC: Congratulations on being selected as the AGA National President-Elect in July! Can you share with us your plan and any items you would like to achieve to prepare for your national presidency starting in July 2024?

Frank: Thank you, I am honored to begin serving as the AGA National President-Elect in July 2023. I have already met with Past Presidents Wendy Morton-Huddleston and John Lynskey to gather their thoughts, ideas and lessons learned. I am also planning to meet with other Past Presidents, and the current President Melinda Miguel to discuss lessons learned during their time as President-Elect and President. I believe this will provide a strong foundation to build upon during my year as President-Elect and propel me forward when I take the helm as President. I also plan to meet with the incoming President Gwendolyn Sykes to discuss her vision and theme to garner synergy on how we can work together to continue propelling AGA as the industry leader in achieving its vision of advancing government accountability.

In addition to meeting with the previously mentioned Presidents, I plan to work closely with AGA National Leadership and Chapter Leaders to best understand their needs and how I can contribute to the cause as President-Elect. This foundational work will help me develop my vision and articulate my theme to ensure it resonates across the entire organization and beyond. As President-Elect, I plan to be available for speaking engagements and presentations at the chapter level. I want to focus on areas of greatest need such as where we have some chapters who are rebuilding after COVID-19 and would benefit from National Leadership working with them to develop growth strategies, plan events to attract members, and other activities. I also envision leveraging the



Hybrid work culture to enhance collaboration across disparate geographic locations to optimize engagement.

Perhaps most importantly, during my time as President-Elect, I will develop and refine my theme for the succeeding year in 2024 when I assume the role of National President. Recently at the AGA LEAD event in Baltimore, I recognized that “Baby Boomers need more Z’s”! AGA Leadership is naturally transitioning from Baby Boomers to Generation X, then on to Generation Y (Millennials), and ultimately on to Generation Z and so on. Consequently, through these transitional phases we need to continue to identify methods, tools and meaningful ways to remain connected to all the generations through mentorship, knowledge transfer, chapter growth, and other key activities. We need to LEAD “Leverage Engagement and Action with Distinction”!

AGA-DC: Last year NASA achieved what I would call a “perfect” audit result - clean audit opinion with no material weakness/significant deficiency/noncompliance. NASA has come a long way to overcome the financial management

Member Spotlight cont'd.

challenges faced during early and mid-2000s. How did you help out to turn things around and any lessons learned you can share?

Frank: Thank you for recognizing the efforts of our NASA team to achieve such success during our most recent Financial Statement Audit. I attribute much of our success to having strong leadership who set the tone at the top of the organization and understood the importance of Financial Management and the OCFO mission, vision and goal. We were then able to demonstrate value and got buy-in that led to commitment Agency wide. Ultimately the willingness to roll up our sleeves and work closely with all levels of leadership and staff on the key foundational internal control work and reporting protocols to accomplish our intended outcomes.

At NASA we truly value having a diverse and inclusive workforce that bring differing perspectives which allows us to have more fruitful and engaging discussions to address challenges and solve problems proactively. A key lesson that resonates with our entire staff is to discourage organizational silence and encourage analytical thinking. These lessons allow our teams to work cohesively by inspiring leaders at all levels through staff taking ownership of their tasks. We have a collaborative culture of openness and honesty which ultimately allows for shared responsibility of larger objectives that are more impactful to the audits and assessments.

AGA-DC: Attendees of our chapter's monthly luncheon last May had the opportunity to hear from you the story of your father, Lt General Frank E. Petersen Jr., who's the first African American Marine Corps aviator and general. What's the most important life lesson you learned from your father?

Frank: My father taught me many life lessons, but the main ones that come to mind are perseverance, confidence, and courage. I think first and foremost he taught me to believe in myself and to reach for the highest heights. He taught me that no matter how many barriers are placed in my path to always try my best to reach my goals. He also reminded me

Biography

Frank E. Petersen III, CGFM

Deputy Chief Financial Officer – Finance, National Aeronautics and Space Administration (NASA)

Education:

- Master's Certificate in Project Management, George Washington University
- Bachelor's of Science Degree in Accounting, Southeastern University

Professional Experience:

- Deputy Chief Financial Officer - Finance, NASA
- Director, Quality Assurance and Financial Management Divisions, NASA
- Acting Senior Advisor, Diversity, Equity, Inclusion, and Accessibility Program, NASA
- Director, OMB Circular A-123 Appendix A Implementation, Department of Education
- Over 20 years experience in private sector at several CPA and management consulting firms

AGA Activity:

- Active AGA member at both DC chapter and national level for more than 20 years
- Speaker/Moderator, AGA Professional Development Training, National Leadership Training, Internal Controls and Fraud Training
- DC Chapter Monthly Luncheon Programing Team
- AGA National President-Elect (starting in July 2023)

that along the journey I would meet people who would do the right thing. He taught me that the journey may be difficult at times but perseverance will help me stay focused on the big goals. "Stay out of the firefights" was a huge difference maker for me... oftentimes I have been able to put the small stuff aside and actually achieve the greater goals. For example, I know how to balance failure and success, understanding the valuable lessons learned from missing the mark from time to time and maintaining a growth mindset that fuels future success. For example, we endured over a decade of disclaimed audit opinions and now I have helped lead the agency to 12 consecutive unmodified audit opinions. My father also taught me humility. He accomplished a heck of a lot but was a humble man and just a great all-around guy at the end of the day!

Member Spotlight cont'd.

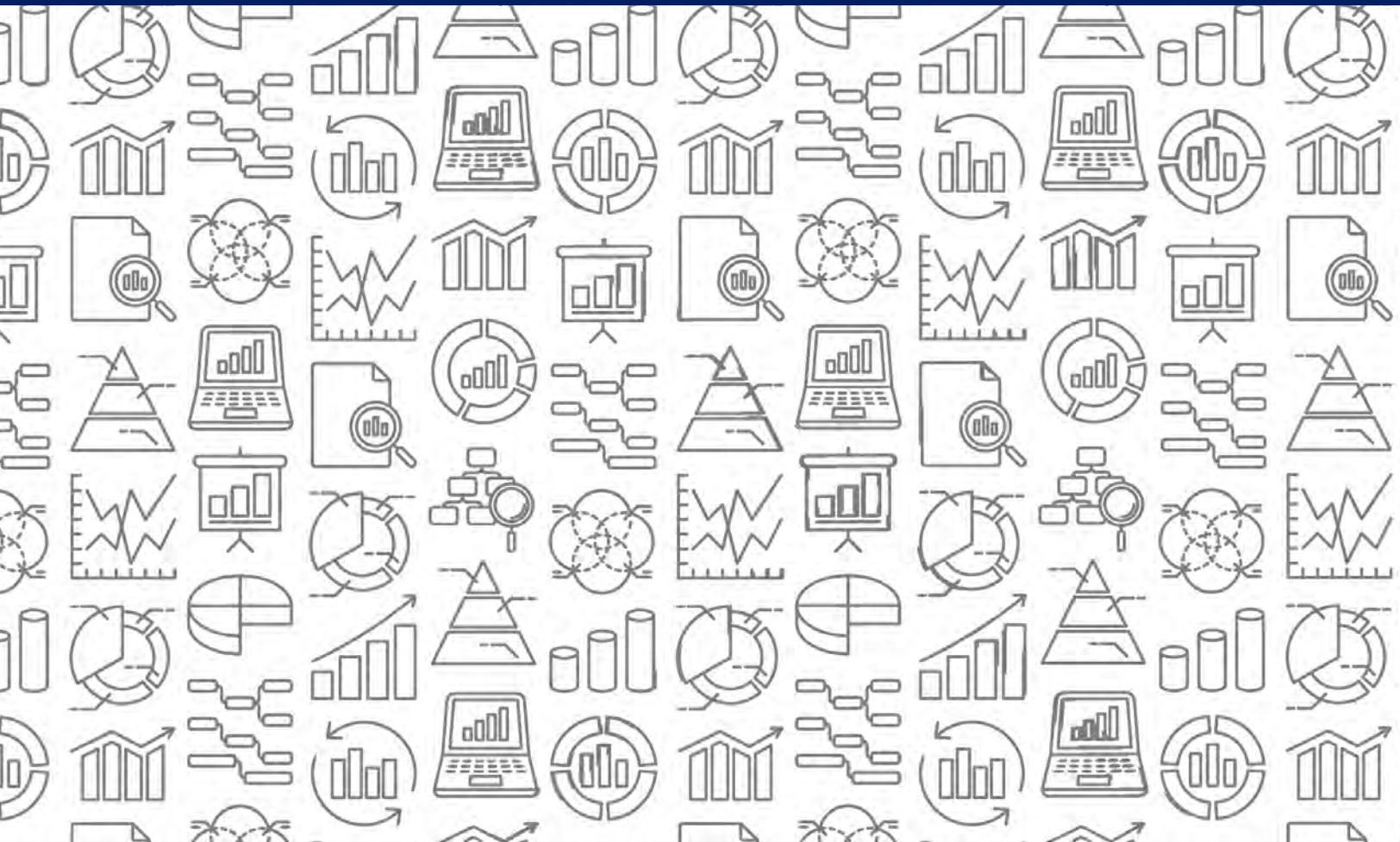
AGA-DC: What keeps you motivated each day?

Frank: Legacy which is defined as a gift from the past to help better the future is what keeps me motivated every day. I was given a gift from the past of leadership that came directly from my closest family members who overcame barriers to achieve high levels of success. The distinct ability to share my knowledge, lessons learned and perspectives with others in an effort to help them is my main motivator. As an Inspirator, I intend to inspire others to achieve excellence in being the best that they can be. I hope they can leverage the things I pass on to them and combine it with their skills to ultimately continue to improve themselves and their mission in life. I continue to do that at NASA each day and throughout the Federal Financial Management

landscape. This is my way to inspire and motivate others to strive to meet and exceed their personal goals and objectives. I am greatly motivated to lead and as a strategic leader it is my responsibility to help each person grow. I believe that everyone can add value and that each team member must be heard and be nurtured and cultivated at a pace that benefits them and the organization. Mutual benefits can be achieved based on the desire and ambition of the individual and the needs of the organization. I am motivated by coaching and mentoring as foundational to my commitment as a servant leader.

AGA-DC: Thank you for your time and insights, Frank!

The contents of this interview had been condensed and edited for length and clarity.



Member Spotlight

Guy Hadsall, PMP, CISSP

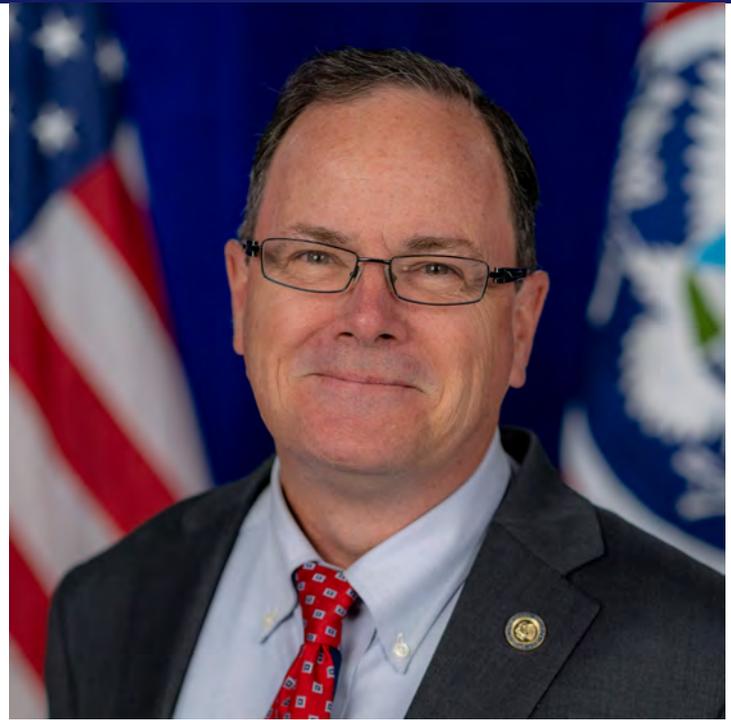
Chief, Cyber Forensics Branch, Department of Homeland Security - Headquarters

AGA-DC: I understand you became an AGA member last summer. How did you first learn about the AGA and why did you become a member?

Guy: Previously I was the Chief Technology Officer (CTO) with the AmeriCorps OIG in 2013, which is where I learned about the AGA. To me it was self-evident as to the value that AGA brought to the IG community. Not only through their industry wide audit training and collaboration, but especially through their support to the entire IG's audit community members and executives ensuring consistent oversight to their Agencies. I witnessed the AGA members involved in the careful and deliberate revisions to the government wide standards ensuring the validity of the audits results. As the CTO of a small agency, where everyone was expected to roll up their sleeves, I was privileged to work alongside the audit professionals in their effective oversight of the AmeriCorps grants as well as Agency practices. It was only when I left the OIG to join a large Agency that I fully appreciated the AGA members and that which they held as true. In my role at DHS, we too are "truth tellers" who seek the objective provable truth. We too hold processes tightly, as they represent the quality of our months-long work for the law enforcement community.

AGA-DC: As an information security expert, you've worked and led projects even before commercial internet became a thing. Do you feel like you've seen it all?

Guy: From running BBS's [editor's note: Bulletin Board System] in the 80's, to building global private and public networks, to auditing critical networks servicing billion dollar supply chains, I've been very blessed to have been empowered to do many awesome things professionally.



And after decades of experience when I was invited to join the AmeriCorps OIG, I thought I knew everything I needed about "auditing." I was sorely wrong; the rigor of an AGA trained auditor who utilizes the appropriate standards from the GAO, CIGIE, and/or other federal/industry standards blew my mind. I knew SOX, FISMA, DIACAP, GLBA, as well as ITIL, Cisco, Juniper, VeriSign, and other "IT standards" to include SANS (e.g., CIS Security), but they were not the same as the Yellow/Blue Book nor the QSI of the IG community. What I did share with the auditors was the requirements for objectivity, for evidence or proof, that something existed or did not exist. What I found in the OIG audit community, and later the broader AGA community, were subject matter experts that were willing and who had the same thirst for objective data and knowledge. We wanted to not only understand, but to be understood.

When I said "NIST Control 2.2," they wanted to know what that meant to the business and how it related to its risk portfolio. I learned more about enterprise risk in my first 18 months than I did in the two decades prior just why working with those AGA members. A mentor from my years at Bellcore had the motto to "Wear out, don't rust out." When I am unable to learn more, when I cannot help others to realize their best, when I cannot help others be their best, then I believe I will be sufficiently worn out. Even then, I doubt that I will have "seen it all,"

Member Spotlight cont'd.

however, I will feel complete.

AGA-DC: You've mentored new interns and recruited them to join Federal services. Can you share with us your success stories and tips?

Guy: Like many, I have had mentors. Those persons that professionally entered my life and CHOOSE to help me. They didn't have to help me - it was a choice and I'm honored and proud that they gave me so much of their lives. Since childhood growing up on a farm, I have been a servant leader. To give more than I take, to help others when things need to get done, to be appreciative of the gifts that are before me and respectful to others surrounding me. I stand today on the shoulders of giants in the federal government, academic, and private industry. And many of those giants have been the supervisors and executives that believed in me too. I've been blessed to serve many others as their mentors, I'll choose a couple to illustrate the value to the Agency and to the federal workforce.

I was asked by my then new IG in 2013 "What are my Top 10 riskiest grants?" I didn't know but set out to discover the answer, regardless of if it had never been asked before. In 2016 I was honored to have the answer to the IG's question, but it was the journey that I'm the proudest of as it involved many hands, many ears, many ideas, and just a little luck. On a budget of "pizza and Cola," we recruited an undergraduate student in computer science in 2015 to be our intern who liked to code. He knew the classic coding languages as well as some SQL and dabbled in R and python. Through his energy and with the guidance and trust of others in our small Agency, he set off to answer the "Top 10" question. It took a small village at our OIG to listen to him, understand his questions, answer them, guiding him in the direction of his quest for the Top 10. Using an Agile methodology, over many sprints, he discovered the answer! The ripples of his work echo throughout that OIG as well as many others today because he shared that knowledge with others. We answered the Top 10 question, but more importantly we began a small revolution in our legacy data.

Biography

Guy Hadsall, PMP, CISSP

Chief, Cyber Forensics Branch, Department of Homeland Security - Headquarters

Education:

- Masters of Science, Information System - Data Communications, American University
- Bachelor of Science, Business, University of Central Missouri

Hometown: Kansas City

Fun Fact: I'm a decade long KCBS Judging Apprentice who just can't seem to make it to enough KCBS Competitions to qualify. But it's not about the goal, it's about the BBQ journey!

Professional Experience:

- Chief, Cyber Forensics Lab, Department of Homeland Security
- Chief Technology Officer, Office of Inspector General, AmeriCorps (formerly Corporation for National and Community Service)
- Supervisory IT Specialist, Health Resources and Services Administration (HRSA), Department of Health and Human Services
- Team Lead, National Airspace System Security Information Group, Federal Aviation Administration
- Principal, Security Architect, Smartronix
- Senior Security Engineer, Telcordia Technologies
- Adjunct Professor, American University (Kogod School of Business)

AGA-DC: What keeps you motivated each day?

Guy: The faces of those who ask questions. When a person asks a question (generally) they are curious! I love curiosity because it causes me to think differently. True, I professionally require consistency in process, methodologies, and reporting, but when I'm fully blinded to new ideas I'm biased. When they ask questions, innocently, they're asking me to evaluate my bias first. I'm a much better professional when I know my biases because it allows me to adjust and improve the quality of the products.

AGA-DC: Thank you for your time and insights, Guy!

The contents of this interview had been condensed and edited for length and clarity.

Innovation over uncertainty

Start Navigating

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 [@guidehouse](https://twitter.com/guidehouse)

Special Events

April 2023 VIP Luncheon

Our chapter hosted the VIP Luncheon at Old Ebbitt Grill in downtown DC on April 27, 2023. Ms. Jolene Ann Lauria, Acting Assistant Attorney General & Chief Financial Officer for Administration with the Department of Justice, was our guest speaker. Paul Marshall, our chapter Sponsorship Committee Director and VP from MIL, made the speaker introduction.

During the VIP luncheon, Ms. Lauria discussed the Department of Justice's modernization efforts. She answered questions from our 16 Diamond sponsor representatives (MIL; Cotton, a Sikich Company; PNC, Guidehouse, Kearney & Company, JP Morgan, RMA Associate, and OneStream).

Thank you Ms. Lauria for her insights, our Diamond sponsors for the participation and support, and our sponsorship committee for organizing this in-person VIP Luncheon.



Special Events cont'd.



June 2023 VIP Luncheon

Our chapter hosted the VIP Luncheon at Old Ebbitt Grill in downtown DC on June 6, 2023. Mr. Vinay V. Singh, the Chief Financial Officer of the U.S. Department of Housing and Urban Development, was our guest speaker. Paul Marshall, our chapter Sponsorship Committee Director and VP from MIL, made the speaker introduction. Our Diamond sponsor representatives (MIL, Cotton, PNC, Guidehouse, Kearney & Company, JP Morgan, RMA Associate, and OneStream) enjoyed Mr. Singh's presentation on "Future of the Workforce" and the Q&A session.

Thank you Mr. Singh for his insights, our Diamond sponsors for the participation and support, and our sponsorship committee for organizing this in-person VIP Luncheon!



Mr. Vinay V. Singh
Chief Financial Officer, HUD



Special Events cont'd.



Washington Nationals Baseball Game

We had 35 members and their guests joined the Member Services Committee on April 29, 2023 to cheer the Washington Nationals against the Pittsburgh Pirates! Our members and guests enjoyed the food, drink, and company throughout the game at Nationals Park. We've got GREAT feedback on our event, too! Here're some examples:

"Thank you so much for setting this up Anthony. It was the first time that we had taken advantage of this opportunity and it was an easy one to follow. Look forward to future ones that meet our schedule. It was nice to see everyone that attended the event."

"Thanks Tony for planning such a great event. It was a great day even though they lost. The seats were perfect."

"This was a lot of fun! It was great to see and say hi to everyone. We had great weather and the latin hotdogs were delicious. Thank you for organizing this event."

Thank you to those who participated in the event and your great feedback! And BIG thank you to Tony Richards from the Member Services Committee organizing this event!



Special Events cont'd.



Wine Tour

Our 44 DC Chapter members and their guests participated in this year's Wine Tour on June 3, 2023. The group did tastings together at three Northern Virginia wineries. Everyone had a wonderful opportunity to enjoy good wine, good food, and great company! Many thanks to Crystal Wolf, David Baskin, Anthony Richards, Manoj Mirchandani for organizing all of our member networking events throughout the year!



Special Events cont'd.



Special Events cont'd.



Program Year-End Happy Hour

Our chapter members and sponsors celebrated another successful program year on June 14 at The Salt Line in Navy Yard. Everyone enjoyed great food, drink, and company.



AGA DC 21st Annual Training



March 29 and 30, 2023, Washington DC Chapter successfully held our 21st Annual Training at Marymount University (Ballston Campus) in Arlington, VA. In partnership with the AGA Northern Virginia Chapter, this event provided training by key leaders in the Federal financial management sphere delivering insight into the current financial environment. We are grateful for more than 170 attendees both in person and virtual attendees.

We have uploaded our training agenda here: [21st Annual Training Agenda](#) and slide decks for each session from the annual training here: [2023 Annual Training Slide Decks](#) in our chapter website.

AGA DC Annual Training cont'd.

We would like to thank all of our speakers, moderators, sponsors, and volunteers for making this year's annual training a successful event!

Conference Planning Committee Members:

- Brittany Hopwood, KPMG (Program Director)
- Karin Dasuki, Department of Energy (Co-Director - Technical Committee, Government)
- John Hooley, MIL Corp (Co-Director – Technical Committee, Private Sector)
- Annalena Winer, CGI (Director – Logistics)
- Sophie Cutler, KPMG (Director – Virtual Programming)
- Tonya Baker, Guidehouse (Co-Director – Registration)
- Tyler Hampton, Guidehouse (Co-Director – Registration)
- Christy Beck, CLA (Director – CPE)

On-Site Volunteers:

- James Haskins, KPMG
- Robert Mackey, KPMG
- Cody Wolfe, KPMG
- Diane Rudnick, Retired

Technical Committee Members:

- Brian Feehely, PNC
- Katie Labadie, RMA
- Paul Lionikis, Cotton, a Sikich Company
- Paul Marshall, MIL Corp
- Lindsey Nosari, Kearney
- Denise Petitta, JP Morgan
- Lora Pickard, MIL Corp
- Megan Prout, Kearney
- Jerry Shaw, PNC
- Kristen Stehlik, Guidehouse
- Duane Wunsch, JP Morgan



AGA DC Annual Training cont'd.



AGA DC Member Survey Results

Program Year 2022-2023

Thank you for taking your valuable time back in February and March to complete our annual chapter member survey and provide your feedback! To express our appreciation of your feedback, we randomly selected the following two survey respondents who received a gift card! Congratulations to you both!

- **Katrina Clemons**
- **Claire Taylor**

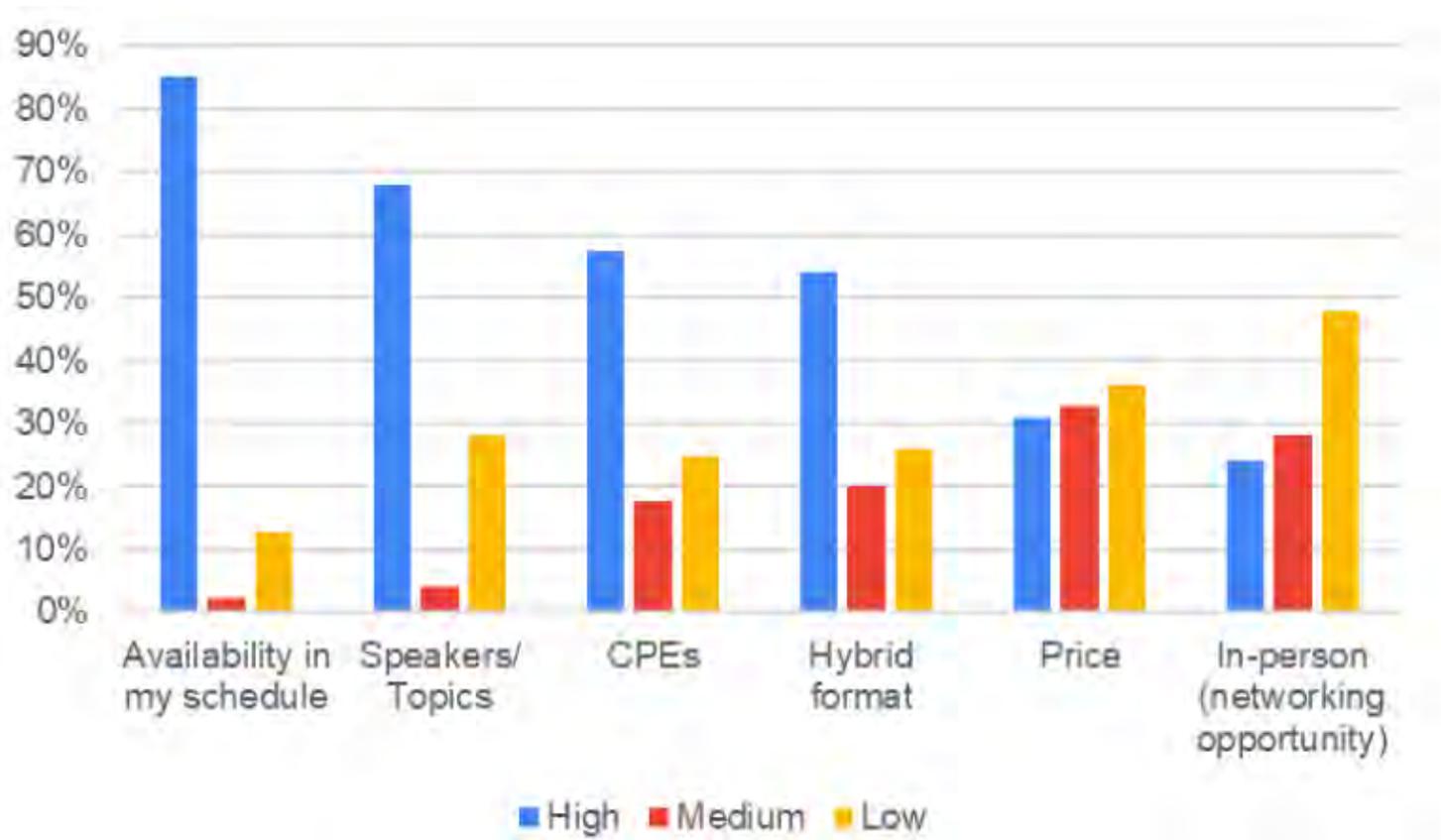
A special shout out to **Wendy Allen**, our chapter's volunteer on survey design and analysis, who did an outstanding job again in creating this year's member survey and assisting the chapter leadership in analyzing the results. **Thank you, Wendy!**

Our chapter leadership takes your feedback seriously and has been analyzing the survey results during the past month and will continue to do so to prepare for the next program year. For now we would like to share with you key results from the annual member survey that may be of interest.

Overall Satisfaction Rate

For this program year, our chapter had a **91%** satisfaction rating! Results consisted of 51% as “Very Satisfied” and 40% “Satisfied” and reflect a 5% increase of satisfaction rating from prior year!

Monthly Luncheons

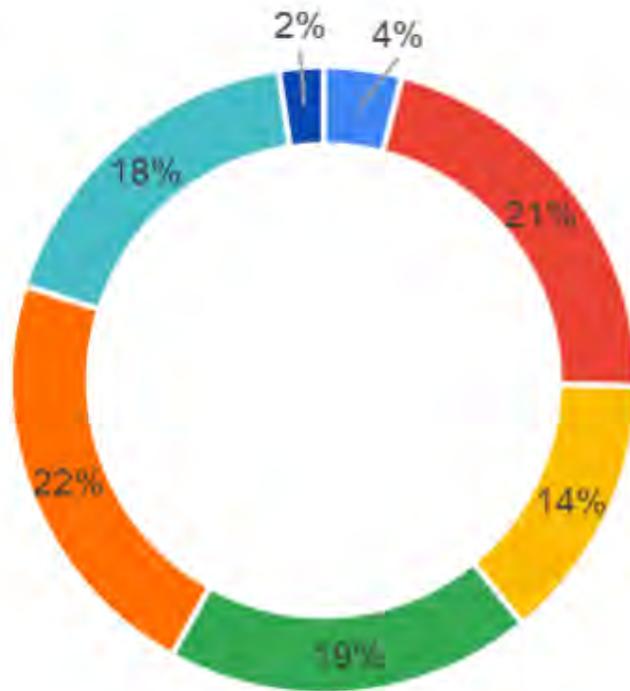


Continuing the hybrid format appears to be important to you as hybrid format provides an option to you to attend if your schedule does not permit them to join in person - in which our chapter plans to continue to hold our luncheons in hybrid format.

AGA DC 21st Annual Training cont'd.

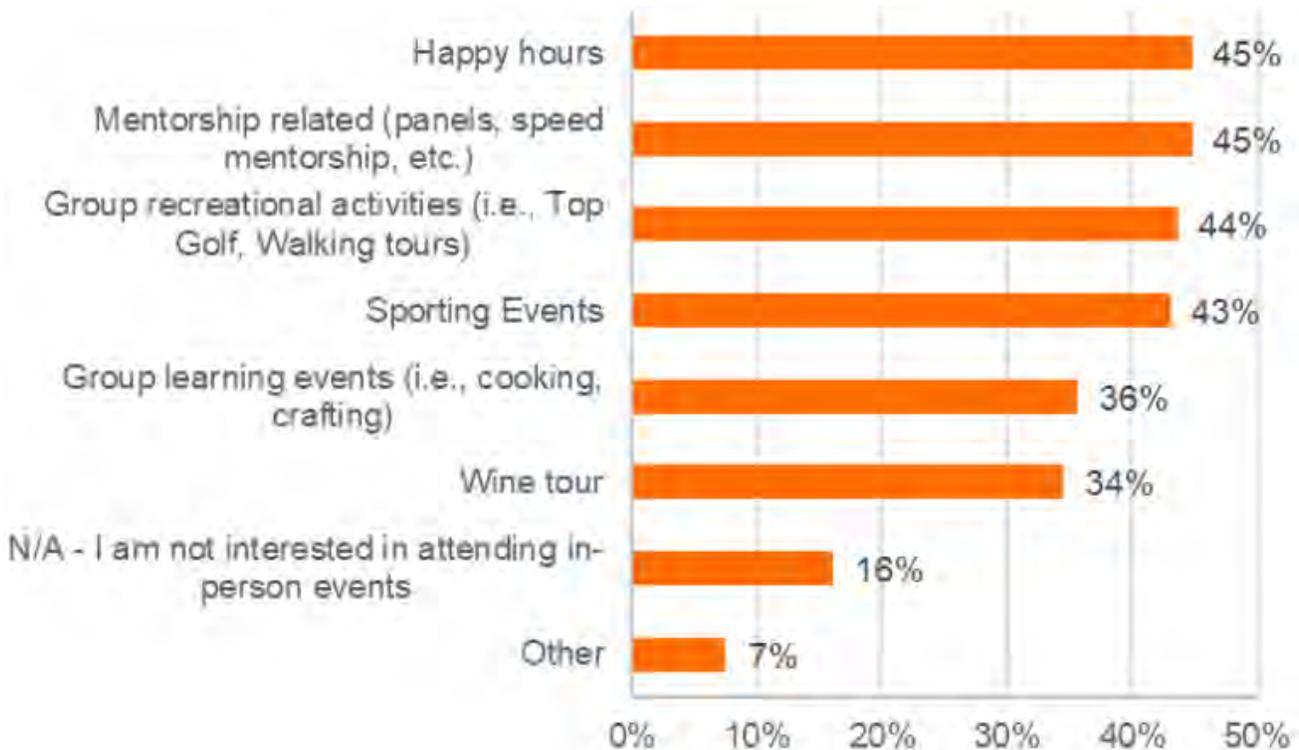
Annual Spring Training Event

- Networking opportunities
- Speakers/Topics
- Opportunity to earn CPEs
- Price
- Availability in my schedule
- Flexibility of attendance options (Hybrid)
- Other



Similar to our monthly luncheons, you told us that your availability, training speakers/topics, prices, and hybrid format offering are top factors for you to join our annual training event.

Preferred In-Person Events



AGA DC 21st Annual Training cont'd.

Results are fairly consistent to prior year, with the mentorship option was a new response and received positive feedback. Also, the Happy Hour percentage has increased, as many of you are more comfortable coming back in person.

CGFM

Study Assistance	Percentage*
• Self-study options (loaner on-line materials/practice exams)	41%
• Instructor led Intensive Review Course (attendees to purchase materials ahead of time and prepare for a three-day course covering all three modules)	24%
• Partial instructor led course (select module(s) only)	21%
• Study groups (materials not included)	14%

Among our members who are pursuing CGFM, we asked what format of study assistance that our chapter could offer where you would find most beneficial. Consistent with previous years, many of you prefer self-study options followed by instructor-led intensive review courses. We will continue to look for creative ways to bring you study options!

Conclusion

Our Chapter remains committed to provide you with high quality monthly luncheon and educational events, when education/training continues to be your priority. As our Chapter continues to provide our training events in the hybrid format, we will look for new and innovative topics, speakers, and member networking events.

We are grateful for the 91% satisfaction rating. Thank you for your support and engagement for this program year! We are a volunteer organization and thank you for your "feel good" comments to recognize hard work made by our committee members. We also greatly appreciate your feedback on areas for improvement, as our chapter continues to look for ways to provide a more inclusive and transparent environment.

You do not need to wait for the next member survey to make a difference! Please let us know if you have any feedback or suggestions, or you are interested in volunteering with our chapter! Contact us at agadc@agadc.org today!

Thank you!



Thought Leadership

By: J.P. Morgan

Check fraud remains prevalent

63%

of organizations faced some kind of check fraud

75%

of organizations do not plan to discontinue issuing checks



Implement payee verification services with financial institutions including payee matching in check verification, to prevent fraudulent or mistaken payments.

Business Email Compromise (BEC) still ranks as a top threat

BEC remains the root cause of fraud at the majority of organizations

71%

of companies have reported being victims of fraud via email

45%

of BEC fraud attempts occurred through wire **the highest in five years**



Top 3 ways you can combat BEC:

1. Implement company verification policies (e.g., contact information from a system of record) before making changes to existing invoices, bank deposit information and contact information.
2. Confirm requests for any transfer of funds by executing a callback to an authorized contact at the payee organization using a phone number from a system of record.
3. Continuously educate employees on BEC threats and how to identify email scams.

Thought Leadership cont'd.

J.P.Morgan

Gauge your organization’s performance against fraud: Are you ahead or falling behind?

The 2023 Association for Financial Professionals (AFP®) payments fraud and control report key highlights contains information for businesses to assess how they measure up in comparison to other organizations as well as stay updated on key trends.

Read on for details on measuring your fraud experience to others as well as information on trends within digital, check, and business email compromise fraud—plus tips to help mitigate fraud.

2023 AFP Fraud and Control Report Key Takeaways

Payments fraud incidence

65% of organizations report being a victim of attempted or actual payments fraud in 2022



Fraud victims

84% of companies with an annual revenue at least \$1B and more than 100 payment accounts report that they were a victim of attempted or actual payments fraud

Fund recovery time

61% of organizations recovered funds within two weeks of fraud occurring



Trends in payments fraud

Uptick in Digital Fraud

10% increase in commercial card fraud

6% increase in both ACH credit fraud and virtual card fraud



Implement validation services for digital payments

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Thought Leadership

Change is a Disrupter – But it Doesn't Have to Be!

By: Holly Ann Morton, The MIL Corporation

Change is a disrupter and employee responses to change initiatives typically fall on a spectrum. On one side of the spectrum, there are those who are comfortable with, and even invigorated by, change. Transformation means process improvement to these employees. In the middle of the spectrum, there are those who say they are comfortable with change but question the motives and may initially be deliberately uncooperative until they can see the benefits. At the opposite end of the scale, there are those who openly resist change initiatives and will defy any disturbance in their day-to-day routine. Change is a disrupter, and no matter if employees embrace or resist the transformation, if the initiative is mishandled or disordered, more harm can come to a situation than good.

In the government financial management world, change is integral to the nature of the work because regulations change. For example, standards for leases and land are changing right now. FASAB, GASB and FASB know “change happens” and include Implementation Guides on their website. Small and large changes, such as needing to evaluate leases based on new regulatory capitalization criteria, drive process transformation. Mishandling large changes such as this can be avoided by 1) implementing John Kotter’s 8 steps to sustainable change 2) better understanding and planning for change resisters.

John Kotter, in his [Leading Change](#) (and the updated [XLR8 \(Accelerate\)](#)) defines the necessary steps for driving sustainable changes in an organization:



Step 1	Create urgency	Over communicate the change! This step is the initial outreach to employees letting them know the change is coming and why it is so critical. Getting this step right inspires employees to want to be part of the change. Skipping this step directly leads to a resistance behavior: Lack of awareness of the change.
Step 2	Build a coalition	Attract a core team to support and drive the change. These can be volunteers, a selected crew, or a combination of both. The key is ensuring your coalition is energized, cohesive and action minded toward the goal of the change initiative.
Step 3	Form a strategic vision	After Step 1 it is time to shape the complete change vision. Use your storytelling skills in this step and craft a before and after image highlighting how the change will improve the current scenario. Pro Tip: Brand the change initiative!
Step 4	Enlist the volunteers	Build the army of ambassadors to carry the message into the troops and energize the change efforts at the employee level. Pro Tip: Brand the advocates with tee-shirts, host facilitated “Create Change” work party gatherings to give the advocates opportunities to communicate with employees on the benefits of the initiative.
Step 5	Remove barriers	Formally identify and diminish process, system and leadership resistance barriers that will prevent successful change from occurring.
Step 6	Generate short term wins	Create breadcrumbs of success to accelerate the change of momentum. Identify where short-term, small wins can be communicated. Doing so will keep the initiative alive in employee minds and continue to show the project creating improvements.

Thought Leadership cont'd.

Step 7	Sustain that acceleration	Lean on the core team to energize the ambassadors, continue to communicate the small wins, flood the organization with the change brand and begin to identify where internal processes will need to be updated.
Step 8	Institutionalize the change	The end is the beginning! Once the change initiative has been fully launched, dig deep into identifying core process improvements required to sustain the change. Ensure barriers remain removed, and the change initiative keeps its branding and change leadership is clearly identified to keep the program on course.

This formal methodology has been codified and used successfully for a multitude of small and large change initiatives, in government and private sector. The trick is not skipping or skimming over any of the 8-steps!

Resistance to change is normal and to be expected. Prosci, one of the industry recognized Change Management leaders, describes the **top five reasons** employees resist change. Organizations can better plan for managing employee responses by understanding and embracing the different aspects to change resistance:

Change Resistor	Resistor Description
Lack of awareness of the change	Employees want to know what is occurring and why. Scaling back communications during a change initiative or assuming employees understand is a direct path to creating an undercurrent of resistance to the initiative. Remember: Over-communication is better than none!
Their job role may change	No one likes to feel instability in the job. Change initiatives can unearth uncertainty related to role changes. Be clear up front about the potential for roles to change, if that is a possibility. Be empathetic to co-workers who have deep comfort in their role and don't want to change.
Fear of the unknown	Fear of the unknown is why we all get our groceries from the same stores each week. What is known = what is safe. Remember, no matter how smoothly a change initiative goes, there are always unknowns. It is natural for employees to fear what might not be clear to them. Do not disregard this resistor as something employees need to 'get over'. Lean into it and allow open dialogue on their fears.
Lack of support from leaders	This resistor is directly linked to Kotter's Step 5 above, removing barriers. If a leader is resisting the change, the employees may follow. Break out the binoculars to identify and dissolve any resistance at the manager and leadership levels.
Exclusion from change-related decisions	No one wants to be blind-sided by a change they had no contribution to. Employee surveys and town hall style sessions are just two ways to solicit and gather employee input on change initiatives. Pro Tip: Be cognizant of staff preferences for providing feedback. Use different methods to ask for employee input on change initiatives.

Understanding and addressing opposition to change initiatives and implementing each the 8-steps are two ways organizations can more successfully navigate through enterprise or smaller project-based transformations. Likewise, tightly aligning a **formal communications strategy** with your change management team. **Pro Tip:** *Make these roles part of the same team!* will diminish resistance. When employees know the vision (the why and the what of the change), how it will impact their role (confronting a resistor), and they begin to see short term improvements stemming from the change, momentum will accelerate and the new path is ahead for process improvement and possibly, innovation!

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- » Testing



AGA Young Professionals and Mentoring

The DC Chapter supports the **AGA National's Achievements in Chapter Excellence (ACE)** program, as we highlight the Young Professionals and Mentoring programs mentioned below:

AGA - Young Professionals

Whether you are considering a **career** in government financial management or have already started down the path, AGA is here to support you! Membership in AGA gives you access to practical resources to develop your skills, expand your knowledge, boost your job performance and advance your career. Remember to check out what each AGA **chapter** offers — like scholarships, board positions and other opportunities to develop your leadership skills. **For more details on discounts, scholarships, awards, education, training, and more, click here: [AGA Young Professionals](#)**

AGA - Mentoring Program

Mentoring is important, not only because of the knowledge and skills young professionals can learn from mentors, but also because mentoring provides professional socialization and personal support. At a time when most are working remotely, having a trusted advisor to turn to can help balance the blending of work and life. The program is open to AGA members only. Having complete and accurate profiles is crucial to the success of mentor/mentee selection and matching! **For more details on the roles of a mentor and/or a mentee, and how to enroll, click here: [AGA Mentoring Program](#)**

Check out
Accountability Talks, hosted
by the DC Chapter's very own
Paul Marshall!

The podcast focuses on the
government accountability
community and is available
everywhere you get your
podcasts.



Community Service

The Chapter offers members the opportunity to “pay it forward” by sharing their gifts and talents with the DC Community through volunteer opportunities in areas such as:

- **Social Safety** - Hunger, homelessness, and unemployment
- **Education** - Literacy and college prep
- **Health** - Awareness for mental, emotional, and physical illnesses
- **Veterans** - Support for service personnel and their families
- **Equal Opportunity** - Diversity and inclusion
- **Capital Causes** - Other local causes

So Others Might Eat (SOME) | Social Safety

The Community Service Committee will be collecting donations for So Others Might Eat (SOME). As with our previous sponsorships, we want to make the biggest impact possible and ask the AGA National to help match our donations.



SOME has been a care provider and a beacon of hope to residents in our nation's capital. SOME's services are available to individuals, families, senior citizens, veterans and those affected by physical or mental illness. Every day, the organization is working to break the cycle of poverty and homelessness through our comprehensive approach, which the organization refers to as “Whole Person Care”.

Many of SOME's clients come with urgent needs—a meal, a shower, a toothbrush. After meeting their short-term needs and establishing trust, SOME focuses on their long-term needs. The organization customizes individual care pathways that meet their physical, emotional, social, financial, spiritual and behavioral needs holistically. The organization's team of social workers, clinicians, instructors and volunteers work together to put their clients on the path to success.

You can participate in giving by going directly to the organization using this link ([SOME Donations](#)). Once you give, please provide a screenshot evidencing your proof of donation to Maurice Preston (mpreston@guidedhousefederal.com) and LaVerne Mason (lmason@bdo.us) so we are able track and take advantage of AGA's matching!

For questions about SOME, please contact the Community Service Committee: Maurice Preston (mpreston@guidedhousefederal.com) or LaVerne Mason (lmason@bdo.us).

We hope you will join us in participating in all or some future community service opportunities. We invite you to share photos on the impacts you are making, and thoughts on how we can support your cause by connecting with the **Community Service Committee**.

As always, thank you, for everything you do to make an impact in our community.



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New Member Contest

DO YOU LIKE MONEY? IF SO, PLEASE READ

During the 2022-2023 Program Year, the Membership Committee of the AGA DC Chapter is continuing to award a **CASH PRIZE** (\$100 in the form of an Amazon gift card) at the end of each quarter (i.e., September, December, March, June) to the member who sponsors and/or recruits the most new members during the quarter. ***The winner of the most recent quarterly referral contest (Jan-March) is Aesha Ray! Congratulations!***

With your help and dedication, we can achieve our Chapter's 10% growth goal of new members this year! **Don't miss out on the great chance to win a CASH PRIZE, and help our Chapter! Make sure your name and AGA ID are included in the membership form of new recruited members!!**

Please note the membership referral/sponsoring application is a three-step process:

1. New members should create a "My AGA Account" on the AGA National website
2. New account login details will be sent to the email provided during registration (Step 1)
3. Within your "My AGA Account," new members must complete their AGA membership application and include the "Recruited by Member ID" and/or "Recruiter's Name" within the Demographics data page of the application.

Recruitment/Sponsoring winners will be contacted via email and announced in the following quarter's newsletter. The Membership Committee looks forward to continuing to grow our membership!

(NOTE: Previous quarters' winners are ineligible for future prizes in the same program year.)

Welcome New Members!

By: Emily Law and Giovanni Leon

The AGA DC Chapter and the Membership Committee extends a warm welcome to our newest members! Thanks to you, the AGA continues to grow. Stay up-to-date on fantastic programs, membership benefits, and recruiting incentives starting now. Remember if you have not yet renewed, you may do so at the [AGA Washington DC Chapter](#) website to take advantage of member benefits throughout the next program year.

Aparna Aaduru	Shankara Ettigi	Janet M. Krell, CGFM-Retired
Helen-audrey Adom	James E. Green, CGFM	Ana M. Lazo
Claudia Arias	Tonia Harley	Maximillian Lehman, CGFM
Omolade Arojoye	Joan Hart	Ngonam Li
Anetria Bolden	Morgan Hayes	Serge Oge Louis
Alesha Bowens	Vonna Denise Holbrook	Christina Low
Regina Kay Castaneda, CGFM	Debbie Jean-Philippe	Andrew Lyons
Steven C. Chan, Jr.	Casandra Denise Johnson	LaTonya Malone
Albani Childs	Jerri N. Jones, MPA	Henry S. Matthews
Dave Clifton	Tyrone A. Jones	William C. McNeil
Kelvin L. Craig, CGFM	Diamond S. Juggins	Omar Jose Negrón Ocasio
Britt A. Cunningham	Elena Kelley	Nomagugu R. Nyathi
Marisa Daley	Katelyn V. Koschewa, CGFM	Oluyemi Omolaja Ogunsanya

New Members cont'd.

Jeremy Allen Olverson
Doreen Oppong
Margarete-Rose Pagano
Harsha Patni
Alfred Poe
Estee Rios
Jennifer Roan
Jasmine J. Rydzak
Olayinka Sage, CGFM

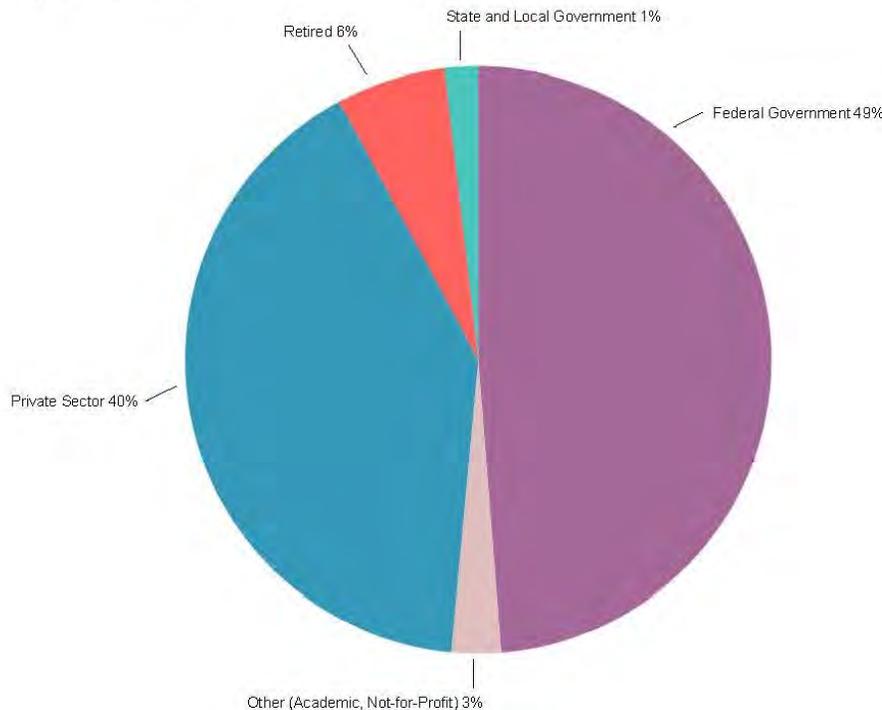
Daniel S. Sauls, CGFM
Jeremy Stone
Toiya Tate
Tam H. Tran
Carlo J. Traverso
Molina M. Treasure
Mukti Trivedi
Warren C. Underwood
Sean Vineyard

AnnMarie E. Walker
Lynn B. Walker
Rebecca Lynn Walters
Kia-Lavon T. Wayne
Xuan Wen
Charlene Williams
Lorna Wilson
Curtis Wynne, CGFM
Steven P. Young

Attention to all new members! Join us at the next monthly chapter luncheon and you will be entered in the raffle for a gift card!

Our Membership Committee would like to share with you more about our DC Chapter members (data as of 5/15/23).

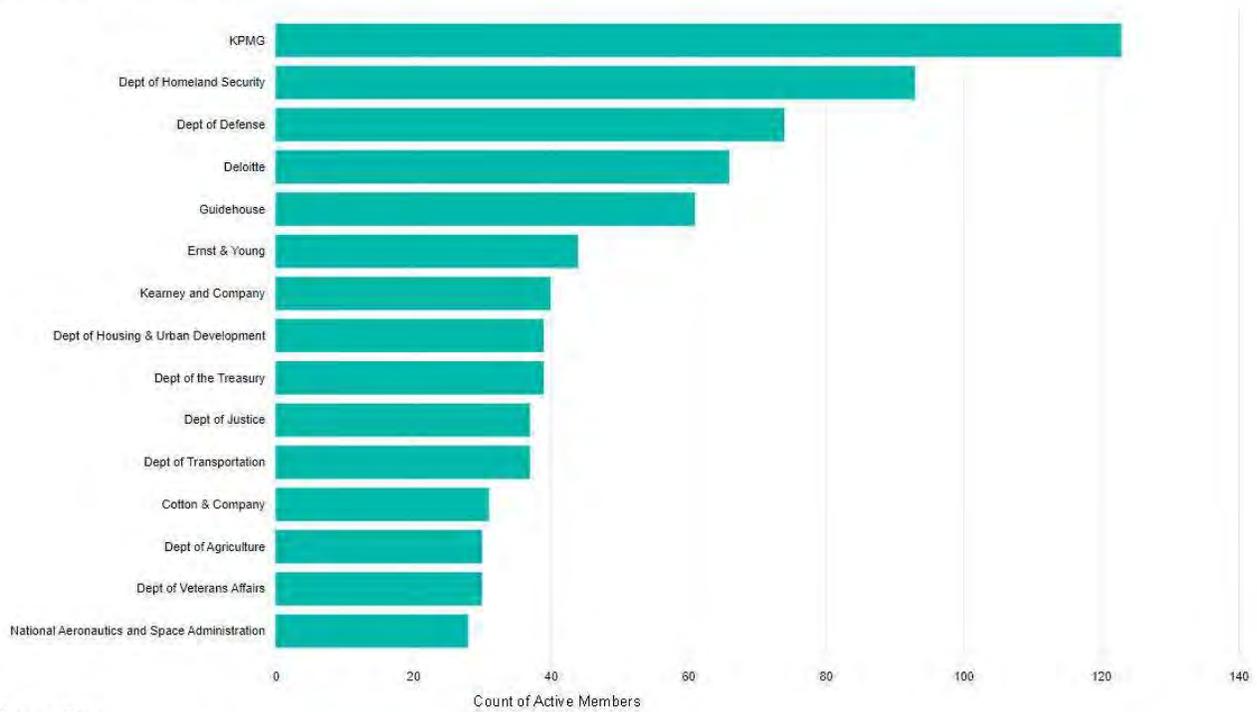
AGA DC Chapter Members by Employment Sector



Data as of May 15, 2023

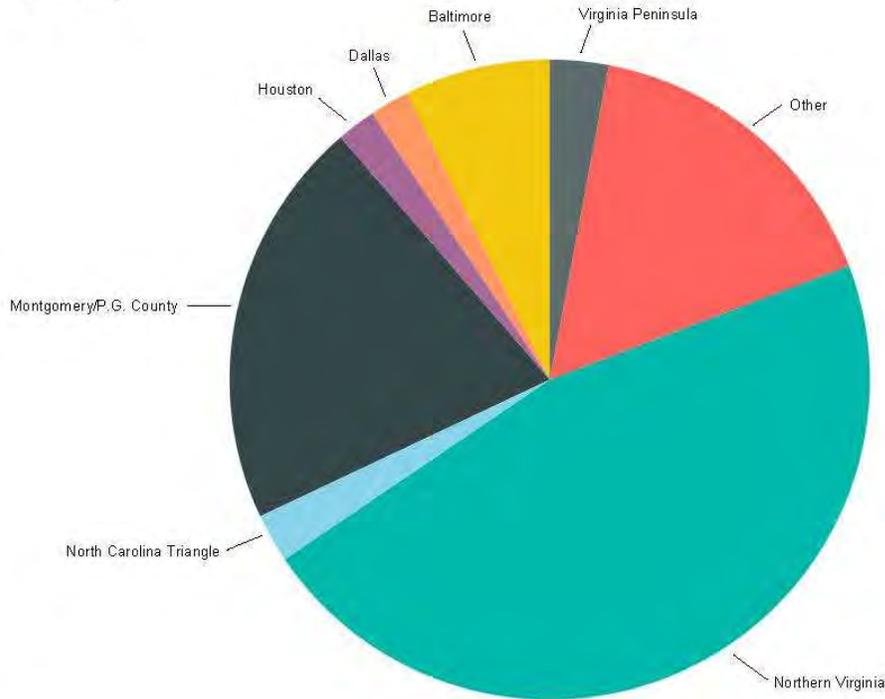
DC Chapter Members Data cont'd.

Top 15 Employers of AGA DC Chapter Members



Data as of May 15, 2023

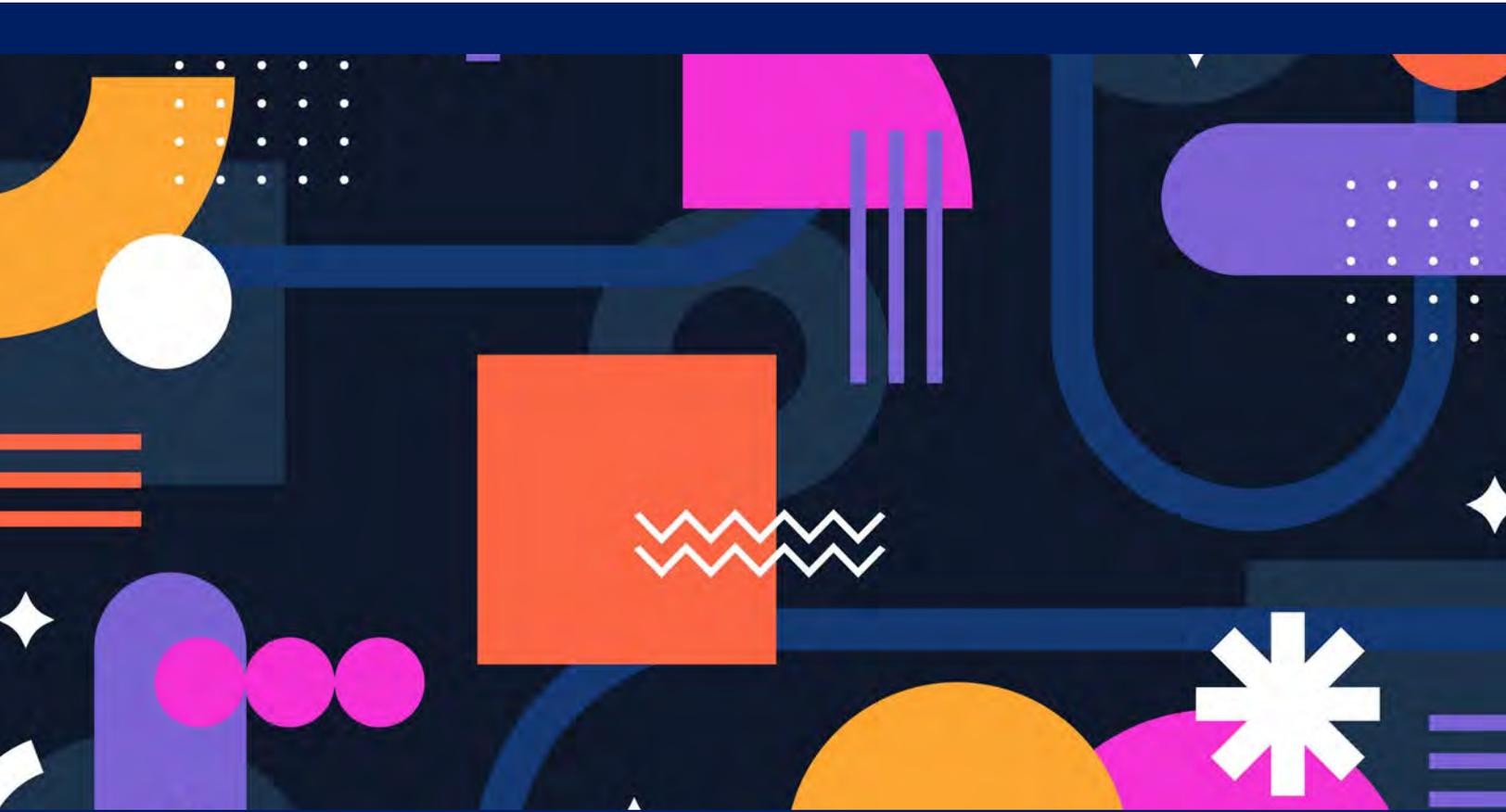
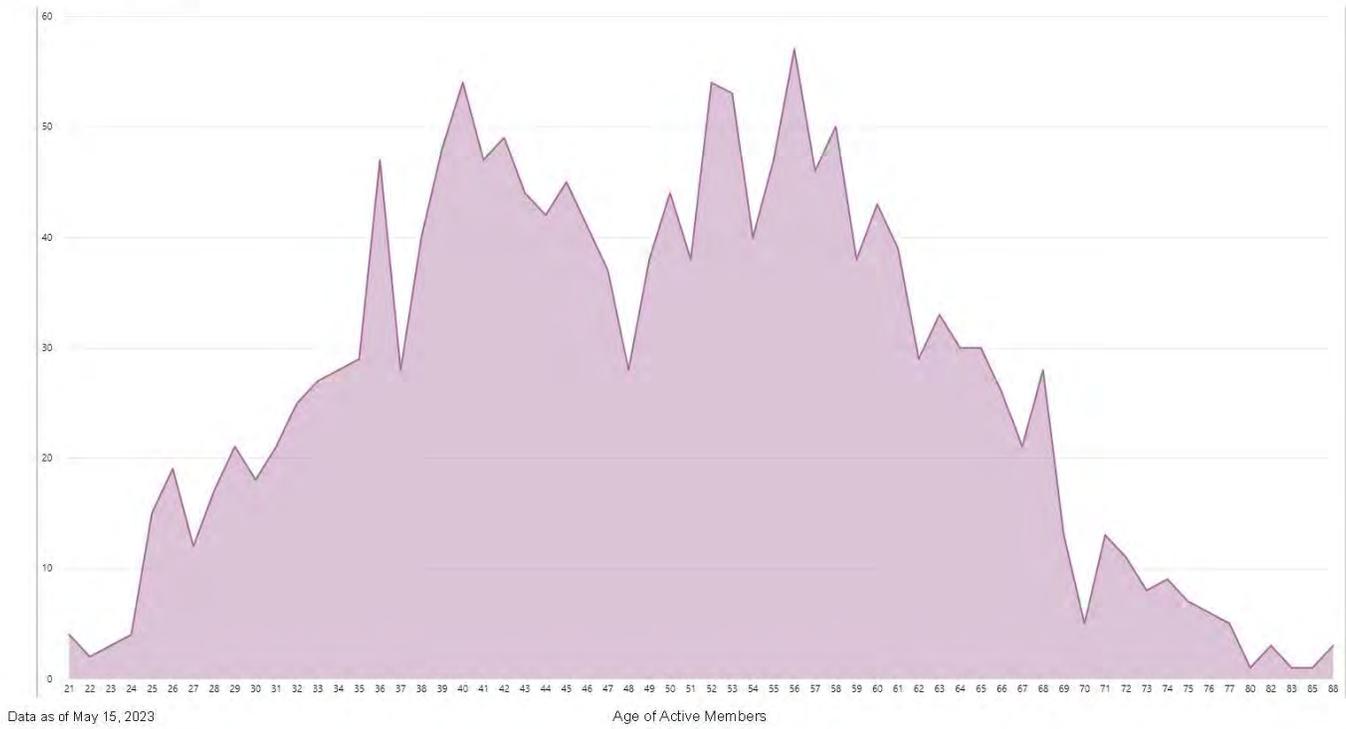
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If you have additional questions about the CGFM Program, please feel free to contact [Debbi Thomas](#).



The following members obtained their CGFM in the period of January 2023 to March 2023!

Ms. Taeree Lee, CGFM
Mr. Jason William Tillett, CGFM
Ms. Zakiyyah Howell, CGFM

Check out our CGFM chapter [webpage](#) or contact [Debbi Thomas](#)

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Inside the Black Box

by Simcha Kuritzky, CGFM CPA

Proposed Right-to-Use Lease Lessee Postings and Tie Points



Background

Treasury has released guidance on how to calculate amounts and which accounts to post for the new right-to-use leases created by Statement of Federal Financial Accounting Standards 54, which is due to take effect in FY 2024. Two posting models were developed, one where the lease was canceled before its full term expires, the other where the lease runs the full term. Prior to the cancellation, the entries were nearly the same. One glaring detail, though, is that the relationship between the proprietary postings and the budgetary postings (also known as tie points) is not fully maintained. This column suggests adjustments to the guidance to keep proprietary and budgetary general ledger account balances synchronized.

Right-to-Use Lease Life Cycle

Ignoring the cancelation entries, the life cycle in both documents can be summarized as follows: appropriation, apportionment, allotment, lease signed (obligation), lessee takes control (capitalization), lease amortization, accrue or schedule lease payment divided into principal and interest as well as variable expenses, disburse principal and interest and variable expenses, and closing entries for the year. These are not in quite the same order as presented in the Treasury guidance, but it groups the entries by posting impact. Treasury shows the amortization near the end of the year (even though many agencies will post this monthly just like lease payments), and variable payments are also at year end.

Lease Funding, Capitalization and Amortization

These entries do not cause any problems for tie points. I won't bother to list the budgeting entries and obligating undelivered orders because those are the same for all acquisitions, and no changes have been proposed. I am listing the capitalization and amortization because these introduce new U.S. Standard General Ledger (USSGL) accounts. While the Treasury hasn't assigned transaction codes yet, I am using the most similar codes below.

B438 Record right-to-use lease asset and liability.

Debit	195000	Lessee Right-To-Use Lease Asset
Credit	293000	Unapportioned - Unexpired Authority
	293010	Unfunded Lease Liability

E120 Record depreciation, amortization, and depletion expense on assets other than investments.

Debit	671300	Lessee Lease Amortization
Credit	195900	Accumulated Amortization on Lessee Lease Assets

It is important to note that Treasury proposes splitting the lease liability into two accounts, one that is unfunded (293010) and one that is supported by undelivered orders (293000 supported by 480100). This mirrors the funded and unfunded split in other liability accounts, such as 219000 Other Liabilities with Related Budgetary Obligations and 299000 Other Liabilities without Related Budgetary Obligations.

Accruals

Here is where things get interesting. First, it is not clear if accruals are recorded in the general ledger only, if they are triggered by a property manager verifying the asset is still in use, or if this represents scheduling the

Inside the Black Box Cont'd.

payment to the lessor. The accounting for all three should be the same, and for our purposes, I am going to assume the accrual is actually scheduling the Treasury payment. Second, there are three accrual entries described for two payments, the variable expense and the regular lease payment, and the latter is divided between interest and principal based on an amortization table. Third, even though these payments should be handled similarly, the Treasury varies the recommended accounts to post.

1. Accrual of Interest Expense (in the guidance for leases with cancelation)

Debit	633000	Other Interest Expense
Credit	214000	Accrued Interest Payable – Not Otherwise Classified

2. Accrual of Interest Expense (in the guidance for leases without cancelation, similar to Treasury Transaction Codes B418 and B134)

Debit	480100	Undelivered Orders – Obligations, Unpaid
	633000	Other Interest Expense
	310700	Unexpended Appropriations - Used - Accrued
Credit	490100	Delivered Orders – Obligations, Unpaid
	214000	Accrued Interest Payable – Not Otherwise Classified
	570000	Expended Appropriations - Accrued

3. Accrual of Principal Payment (in the guidance for leases without cancelation)

Debit	480100	Undelivered Orders – Obligations, Unpaid
Credit	490100	Delivered Orders – Obligations, Unpaid

4. Accrual of Variable Expense (in the both guidance documents, similar to B402 and B134)

Debit	480100	Undelivered Orders – Obligations, Unpaid
	693000	Lessee Lease Expense
	310700	Unexpended Appropriations - Used - Accrued
Credit	490100	Delivered Orders – Obligations, Unpaid
	211000	Accounts Payable
	570000	Expended Appropriations - Accrued

These should all look like entries 2 and 4, which include both budgetary and proprietary GLs are included that maintain the budgetary to proprietary relationship. I see no problems with entry 4: 693000 is a funded expense whose balance is reflected in the 4900 expenditure series of accounts (tie point 4), 211000 is supported by 490100 (tie point 3), and expenditures 490100 supports 570000 expended appropriations (tie point 7). Entry 1 violates all three of these tie points since it only shows the budgetary accounts, and entry 1 violates tie points 3 and 4 since it only shows some of the proprietary accounts. So the interest accrual should use entry 2 and the variable expense should use entry 4, what should the principal payment accrual look like?

Above I pointed out that Treasury split 2930 into funded and unfunded SGL accounts. I think it is necessary to further divide the funded into undelivered (obligated) and delivered (accrued). I would recommend Treasury add 293020 Accrued Lessee Lease Liability and change entry 3 to:

Debit	480100	Undelivered Orders – Obligations, Unpaid
	293000	Lessee Lease Liability
	310700	Unexpended Appropriations - Used – Accrued
	880200	Purchases of Property, Plant, and Equipment
Credit	490100	Delivered Orders – Obligations, Unpaid

Inside the Black Box Cont'd.

293020	Accrued Lessee Lease Liability
570000	Expended Appropriations - Accrued
880100	Offset for Purchases of Assets

This starts with the budgetary GL accounts from entry 3. Because we credit 490100, tie point 3 requires a proprietary liability, which is the new account 293020 (note that neither 293000 nor 293010 would be used for this purpose). Also, crediting 490100 invokes tie point 4 which requires either a debit to either expense or one of the 8800 series of purchase memorandum accounts. Because we are relieving a liability, we need an 8800 account, and because this mirrors B438 purchase of a capital lease, in that we are belatedly expending authority to purchase an asset, I chose 880200 (from G120) which Treasury says is linked to B438. Last is tie point 7, which requires a credit to 570000 if we are using appropriated funds.

Disbursements

The Treasury guidance gives a variety of disbursement entries based on what liability accounts were credited by the accrual. I won't go over all of those. Instead, I will show what is consistent with my recommendations above so that it matches the ending values shown in Treasury's guidance.

Disbursement of Payable (B112 and B235)

Debit	490100	Delivered Orders – Obligations, Unpaid
	XXXXXX	Payable
	310710	Unexpended Appropriations - Used – Disbursed
	570000	Expended Appropriations - Accrued
Credit	490200	Delivered Orders – Obligations, Paid
	101000	Fund Balance with Treasury
	310700	Unexpended Appropriations - Used - Accrued
	570010	Expended Appropriations - Disbursed

The XXXXXX is a stand-in for the three liability accounts: 214000 for interest, 293020 for principal, and 211000 for the variable expense. These entries consistently relieve the liability accounts so tie point 3's relationship is maintained, and they are a wash for expenditures and expended appropriations (both debit and credit), so there is no impact on tie points 4 and 7. The only change is that we need to also check tie point 2, since cash is posted, but since we credit both 1010 and 4902 in all three, that relationship is maintained.

Conclusion

Despite adding new SGL accounts, there's nothing really new in the posting logic for right-to-use leases. Just like capital leases, parts of the lease may be unfunded, and no budget authority is used for amortizing the lease. Interest, principal and expense payments are all obligated in advance, go through an expenditure payable phase, and end up as a disbursed expenditure. It would be most helpful if the new Treasury guidance was consistent with prior guidance and maintained all the tie points.

Comments and critiques, as well as specific questions or suggestions for future topics, are always welcome. Please send them to Simcha.Kuritzky@CGI.com, and not to the AGA.



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