



# The Southwest Sentinel



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Mark you Calendars!  
Southwest Virginia Spring  
PDT – April 27th!



Details to come!



## President's Message



**Curtis P. Joachim, CPA, MBA, CGFM, CGM**

Happy New Year! I hope that you have had an enjoyable holiday season and that your year is off to a great start. By most accounts 2023 is picking up right where 2022 left off. If that's the case for you, I hope that this is a good thing. If it is not, make 2023 the year that you reinvent yourself. The year of new beginnings. The year that you decide to take charge and live life to the fullest, demanding from life what you wish to experience. Like the Artist, the paintbrush is in your hand. Like the writer of a great play, you are the holder of the pen. What story are you writing with the passing of each day? For you my friend, are the writer of the story of your life. Here's to 2023 no matter what new challenges, experiences, and opportunities it may bring.

December is always exciting, and this past one was no exception. We joined forces with the Richmond, Shenandoah, and VA Peninsula Chapters to host the fifth annual Commonwealth PDT. For 2022, the PDT planning committee stretched ourselves and not only did we put on a virtual conference, but we were back in person at the Great Wolf Lodge in Williamsburg. I must say that it was a resounding success, with about 160 attendees from all four chapters. It was great to reconnect with friends and colleagues that we had not seen in years. Our chapter participated in helping run the registration table, as well as the IT desk, and running the PDT's charitable event and raffle. Thanks to our Community Service Chair Leah Kirby for coordinating and executing the event and raffle, during which we raised over \$3,000 for Semper K9 Assistance Dogs located in Catlett, VA.

January's chapter event was a lunchtime webinar where we once again joined forces with the Richmond Chapter for a tax update. Hope you were able to join us for this annual event!

With the rollover of the calendar to a new year, it's time to start planning for our Spring PDT to be held on April 27th. If you have suggestions for a speaker or you would like to be one of our speakers, please let me know. The new year is also time to start putting together the team of leaders for next year's board. Make this the year you step off the sideline and be part of the chapter's leadership. It is now easier than ever to be involved since everything is now virtual. You can do this!

## Chapter Opportunities & Updates

Mark your calendars and join the Southwest Virginia Chapter for our upcoming

# Lunch and Learn Events

**February 23** – GASB Update

**March 30** – CGFM



Back in person at the  
**Commonwealth PDT**  
December 2022



## Chapter Information



Treasurer's Report  
Month Ending December 2022

Beginning Balance: 12/01/22 \$ 8,687.46

Receipts:

No Deposits \$ -

Total Receipts \$ -

Disbursements:

12/9/2022 Amazon-November Meeting	\$ 25.00
12/14/2022 Commonwealth PDT Charity Raffle E-Cards	\$ 440.00
12/21/2022 Zoom-Monthly Subscription Fee	\$ 15.74

Total Disbursements \$ 480.74

Ending Balance: 12/31/22 \$ 8,206.72

Prepared By:

Vicki Delp

Treasurer

Balance Check	\$ 8,206.72
Per Statement	<u>\$ 8,456.72</u>
Difference (Uncleared Check # 1287)	\$ (250.00)



The **Southwest Virginia Chapter** is looking for an organization to support as part of our Spring PDT in April.

Please contact **Leah Kirby** at [lkirby@tjgcpa.com](mailto:lkirby@tjgcpa.com) with your ideas.

## Chapter Information

### Meeting Minutes

November 16, 2022

- **Approval of Minutes**

Motion to approve by Leah Kirby with a 2nd by Vicky Moore. Minutes approved.

- **Treasurer's report**

Presented by Curtis Joachim, account balance as of Oct. 31, 2022 is \$8,698.20. Treasurer's report is in the Newsletter.

- **NGB Representative/Website report**

Presented by Vicky More – deadline for new communications award has been extended until 11/22/22. Researching a SW VA Chapter LinkedIn page. 2nd pulse check for chapter awards is 2/1/22. National PDT award nominations due 4/15/22. Bonus for getting nominations in early. Free AGA National Technology and Transformation Summit on 12/8/22; this is a free training. Go to AGA's national page under events for information and to register.

- **Community Service report**

Presented by Leah Kirby – Charity project for Commonwealth PDT that SWVA chapter is helping with is Semper K-9 Mission, Veteran founded and operated. More information available at <https://www.semperk9.org>. Can donate through the Commonwealth PDT link at <https://donate.semperk9.org/fundraiser/4224018>

Still need to finalize charity for SWVA chapter of AGA – one suggestion is the Montgomery County Emergency Assistance Program – help with fuel, utility costs for local citizens. Will vote early December; to see if any other suggestions come in by Nov. 30, 2022.

- **Communications/Newsletter report**

Presented by Misty Hamed – Newsletter went out earlier this week. We do now have a Facebook page. Anyone with access please like our page. There is a link on 1st page of newsletter that should take you to the FB page.

- **Accountability report**

Regina Williams has been hard at work on putting together the CCR for last fiscal year. Please keep Regina in good thoughts with death of a close family member.

- **Membership and Emerging Leaders report**

Presented by Korey Moore – Still waiting for responses from emails sent out earlier. Also, still waiting on marketing materials from AGA National office. Will follow up with phone calls.

- **Meetings/Education/CGFM report**

Fall PDT is 12/8-9/22 in Williamsburg VA on Strategic Leadership. It is a hybrid event and registration link is in the newsletter. Early bird registration extended to 11/18/22.

- **CPE – How to construct a CCR & Presentation of SWVA AGA 2022 CCR** 1 CPE

Presented by Curtis Joachim. A purpose of the CCR is to help build trust with public. Can see different CCRs on the AGA page. Please contact Curtis with any questions or if would like help in developing CCR for your organization.

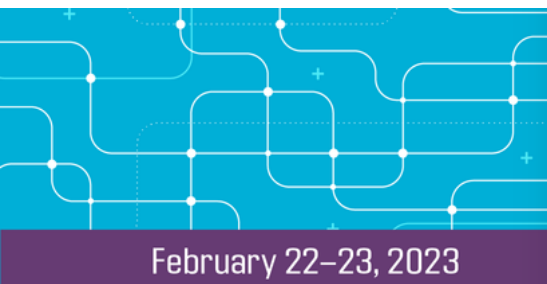
- **Raffle**

Raffle, \$25 gift certificate. Winner: Korey Moore

- **Adjourn**

Next meeting is on January 26, 2023.

AGA Events & News



**AGA**  
National Leadership  
Training 2023



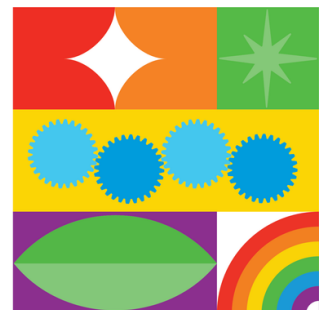
Interested in earning your CGFM?

Take advantage of the 2023 New Year Special \$23 application fee!



**PDT**  
**2023**

July 23-26, 2023  
Orlando or Virtual



AGA National Event Calendar

Connect with Us

# Southwest Virginia Chapter Leadership



**Curtis Joachim**  
President/Education



**Regina Williams**  
Accountability



**Misty Hamed**  
President-Elect/  
Communications



**Vicky Moore**  
National Council of Chapters  
Representative/Webmaster



**Vicki Delp**  
Treasurer



**Leah Kirby**  
Community Service

**Kimberly Howell**  
Secretary

**Korey Moore**  
Membership

Contact information for chapter officers can be found here:  
[AGA Chapter Leadership](#)

AGA Southwest Virginia Chapter  
PO Box 116  
Woodlawn, VA 24381

**Website:** <https://www.agacgfm.org/Chapters/Southwest-Virginia-Chapter/Home.aspx>