

# NEWSLETTER

## December 2021

### PRESIDENT'S MESSAGE

Hello, AGA family.

I hope you all enjoyed the Thanksgiving holiday and enjoyed your time with family and friends. This is a good time to reflect on things you are thankful for. I am thankful for many things, and one of those is our Central KY AGA chapter, as well as our Chapter Executive Committee, who meets monthly to help plan events and keep things moving for our chapter. I'm also thankful for our members for your service and sharing your knowledge and experience.

For those of you that like celebrating or recognizing "national" holidays, I found the following for December:

- National Christmas Lights Day (Dec. 1st)
- Make a Gift Day (Dec. 3rd)
- Santa's List Day (Dec. 4th)
- Christmas Card Day (Dec. 9th)
- Gingerbread House Day (Dec. 12th)
- National Ugly Sweater Day (Dec. 17th)
- Humbug Day (Dec. 21st)
- National Cookie Exchange Day (Dec. 22nd)
- National Christmas Movie Marathon Day (Dec. 23rd)
- National Eggnog Day and Christmas Eve (Dec. 24th)
- National Pumpkin Pie Day and Christmas (Dec. 25th)
- National Thank You Note Day and National Candy Cane Day (Dec. 26th)

Of course, December is also a great month to spread JOY. Joy has become one of my favorite words. What makes you joyful? Some of the things that bring me joy are my family, our dog, sunshine, exercise, and my car seat warmers!! Do you know anyone that is struggling? Do something nice for them! Do you know an elderly person who is lonely? Bring them joy by visiting with them. Do you know a teacher or health care worker who has continued to have a rough year due to COVID? Send them a special treat to thank them and let them know you are thinking of them. However and whenever you can, use this month to bring joy to others, and that in turn, will bring joy to you!!

I hope you all have a wonderful holiday season! Be the good! Be kind! Be joyful!

Alice



### INSIDE THIS ISSUE:

President's Message	<a href="#"><u>1</u></a>
Member Spotlight	<a href="#"><u>2</u></a>
Upcoming Meetings	<a href="#"><u>3</u></a>
Upcoming Presenters	<a href="#"><u>4-6</u></a>
AGA Topics	<a href="#"><u>7</u></a>
October Secretary's Report	<a href="#"><u>8</u></a>
September Treasurer's Report	<a href="#"><u>9</u></a>
October Treasurer's Report	<a href="#"><u>10</u></a>
CEC Members	<a href="#"><u>11</u></a>

<https://www.agacgfm.org>

<http://www.facebook.com/>



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# In the Spotlight

## Teri Harmon

Assistant Director, Office of Audits, Kentucky Transportation Cabinet

**How did you choose government financial management as your career?** Alicia Boyd used to visit Morehead State University job fairs. She also came into some of our accounting and auditing classes to briefly speak about the Auditor of Public Accounts. She seemed very knowledgeable and passionate about the work and I thought that was intriguing. I signed up on their contact sheet to receive information about the office. After graduation based on that information I was more aware of State Government as a possible career path and understood more about what the Auditor of Public Accounts does, so I decided to apply for an auditor position. I then worked for the APA for almost 7 years before coming to the Kentucky Transportation Cabinet, Office of Audits, where I have worked for 8 years.

**What advice would you give a recent graduate joining the field?** I think new graduates should make sure they understand the big picture of what they are doing. To do that they should ask questions and seek knowledge of their job and function within their organization. They should try to gain a good understanding of State Government and how their role fits into the big picture. They should seek out and accept opportunities inside and outside their organization to grow and develop as an accounting/auditing professional and as a person.

**Do you have a mentor and how has this person helped you?** I have several people I have looked up to during my time with State Government. Great people and great professionals that have given me opportunities and wisdom to learn and grow. I feel there is something to learn from everyone you meet.

**How did you get involved in AGA?** While at the Auditor of Public Accounts several co-workers attended AGA monthly meetings and invited me to join. It was a great way to learn about governmental accounting and auditing and connect with a lot of great people.

**Describe your dream vacation.** At some point probably in retirement I would like to take a year to travel within the United States. Just wake up and decide where I want to go that day, which is somewhat contrary to my planning nature, but it sounds fun. I would also like to visit Ireland, Japan, and Greece.





# Mark Your Calendar

» UPCOMING EVENTS

## UPCOMING MEETING

December, 2021

\*Free For Members, \$5 for non-members\*

(Pay through GoToWebinar)

### Upcoming AGA Programs

Date	Speaker	Topic	CPE Hours
December 8, 2021	Brian Ingle	Leadership	1
January 12, 2022	Mark Schmitt and Thomas Copeland	Tax Updates	1
February 9, 2022	Trina Koontz	Building Resilience	1
March 9, 2022	Jennifer Ratterman, Forensic Accountant, FBI Louisville Division	COVID 19/Pandemic Related Fraud	1
April 12, 2022	TBA	Spring PDT	TBA
May 11, 2022	Joseph Donahue, KY State Board of Accountancy	CPE Requirement Updates	1
June 8, 2022	TBA	TBA	TBA

**Note:** If there's a topic or speaker you'd like, please reach out to the 2021-2022 Education Co-Chairs. Their contact information can be found on the last page of the newsletter.

Change is hard and sometimes has both rewards and challenges.

Please remember our website is now hosted by National AGA and we no longer pay for our old url. Old urls are sold and our old url will take you somewhere you need not go! Our current url for you to save in your browser and keep handy for checking out our list of program offerings is below:

<http://www.agacgfm.org/CentralKentucky>

# December Presenter

## Brian Ingle



Brian Ingle has a passion for helping people succeed in life and work. His three main focuses are adding value to others, empowering teams, and creating positive workplace interactions. He is a student of leadership and follows a principled approach, employing his knowledge of personalities and relational intelligence in all of his interactions.

Brian has nearly 20 years of experience, working in leadership positions in all three sectors; public, private, and non-profit. More than half of his leadership experience has been in a variety of positions held in KY State Government. Over the past 10 yrs. in government, Brian has worked in areas from administrative training, where he led the training branch, developing content and presenting trainings on over 50 topics to employees of the Commonwealth, statewide, to Directing the Division of Motor Vehicle Licensing, navigating the complexities of vehicle titling and registration connecting MVL to all 120 county clerk offices. Brian transitioned to the Treasurer's office as the Director of Accounting and Disbursements in December, 2020, where he is quickly unpacking as much as he can learn about eMARS, accounting, and banking.

Brian is originally from Nebraska and is therefore, a huge Huskers Fan. His family lives in Georgetown.

# January Presenters

## *Mark Schmitt*

*CPA, Partner, Auto Dealer Services Team Leader*

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



## *Thomas Copeland*

*CPA, Tax Manager*



Thomas Copeland is a Manager on the Tax Services Team and started with MCM in 2013. His areas of expertise include tax compliance and planning for such niche industries as construction and contractors, restaurant and hospitality, and manufacturers. He has a B.S. in Finance, MBA, and B.S. in Accounting from Murray State University and is a Certified Public Accountant (CPA).

# February Presenter



**Trina Kootz**  
**Benefits Branch**  
**Manager**  
**Personnel Cabinet's**  
**Kentucky Employee**  
**Assistance Program**  
**(KEAP)**

Trina leads Kentucky State Government's EAP providing management tools, including consults with managers and supervisors, as well as assessment and referral services to state employees and their dependents, who may need help with mental health concerns, family issues, substance abuse, or job stress. She also provides continuing education workshops for state employees and professionals seeking credits to meet licensing requirements. Trina earned a Bachelor's Degree from Murray State University; a Master's Degree in Clinical Psychology from Eastern Kentucky University and is licensed to practice by the Board of Examiners of Psychology.

# 26 th Annual AGA Commonwealth PDT

**Adaptability and Innovation in Challenging Times**

**AGA Commonwealth Professional Development Training (PDT) for 16 CPEs**

**Hosted by the Richmond, Virginia Peninsula, Shenandoah Valley, and Southwest Virginia Chapters of the Association of Government Accountants (AGA)**

**December 9-10, 2021**

**8:00 AM—5:00 PM Eastern Time**

Register by December 8, 2021 6:00 PM ET

Please visit [Summary - 26th Annual AGA Commonwealth PDT \(cvent.com\)](https://cvent.com) for more information or to register.



# NLT 2022

**Developing and training government financial leaders**

**February 23-24, 2022, Washington D.C., 14 CPEs**

	On-line	Email/mail
<b>AGA Members</b>		
Early Bird (by Jan 28)	\$425	\$450
Standard (after Jan 28)	\$525	\$550
<b>Nonmember</b>		
Early Bird (by Jan 28)	\$575	\$600
Standard (after Jan 28)	\$375	\$700

**Check out [agacgfm.org](https://agacgfm.org), under the Training & Events tab, for all upcoming trainings.**

# AGA CENTRAL KENTUCKY CHAPTER

## October Secretary's Report

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### AGA Central Kentucky Chapter

#### Chapter Executive Committee

Meeting Minutes for meeting held: October 6, 2021

Members present on GoToMeeting: Alice Wilson, Liz Smith, Natalie Young, Ann Case, Terra Coffey, Catherine Hunt, Kristen Hundley, Joe McDaniel, Michelle Sutton, Jared Crawford, and Kristen Coffey.

1. Call to Order by Alice Wilson.
2. Regular Reports:
  - a. September Meeting minutes – Motion to approve – Kristen Coffey, seconded by Natalie Young. Motion passed.
  - b. Treasurer's report – Motion to approve – Joe McDaniel, seconded by Jared Crawford. Motion passed.
  - c. Membership information – 162 members with 2 new members
3. Old Business
  - a. Programs update
    - i. October 13 – Stephanie Robey
    - ii. November 10 PDT – virtual
    - iii. December 8 - Brian Ingle (confirmed) – Leadership
    - iv. January 12 – Dylan Schneider and Mark Schmitt – Tax Update
  - b. Please provide at least one suggestion of a speaker/topic to the Education Committee by (Kristen, Evie, Michelle)
  - c. Reminder: Submit newsletter items by 15<sup>th</sup> of the month
  - d. Central KY AGA website updates
  - d. Speaker Community Service donation: Beth Roark – Frankfort Independent Schools - Motion to approve – Joe McDaniel, seconded by Catherine Hunt. Motion passed.
  - e. Stripe renewal
  - f. Budget
  - g. Other
4. New Business
  - a. Education for 2021-2022 – Rates approved via email
  - b. CCR due October 31
  - c. CGFM exam fee reimbursement-Christina Shuffett – September 23, 2021 notification (\$375)
  - d. Other
5. Next meeting October 3, 2021 (11:30—12:30) via Teams
  - e. Adjourn, minutes – Motion to approve – Joe McDaniel, seconded by Jared Crawford. Motion passed.

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# September TREASURER'S REPORT

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## Central Kentucky AGA

### Treasurer's Report

Month Ended September 30, 2021

Reconciled Cash Balance as of 08/31/2021

\$29,564.97

#### General Receipts:

Monthly Program Fees - Cash	
Monthly Program Fees - PayPal	
Monthly Program Fees - Check	
Monthly Program Fees - STRIPE	13.65
Central KY Membership Dues	
Interest Earned - Checking	0.66
Interest Earned - CD	11.53
	25.84

#### Education Receipts:

PDT Training Fees	-
PDT Training Fees - Paypal	-
	-

Total Receipts 25.84

Total Funds Available 29,590.81

Less: Expenses (3,000.00)

CCU Balance 09/30/2021 \$26,590.81

Less: Education Fund Balance -

General Fund Balance 09/30/2021 \$26,590.81

#### General Expenses:

Jacob Levey - Scholarship	1,500.00
Adam White - Scholarship	1,500.00
	3,000.00

#### Education Expenses:

	-
	-

Total Expenses \$3,000.00

## Central Kentucky AGA

### Change in General Fund Balance

Month Ended September 30, 2021

General Fund Balance 08/31/2021 \$29,564.97

Transfer of Education Fund Balance

Monthly Receipts 25.84

General Expenses 3,000.00

Net Increase (Decrease) in General Fund Balance (2,974.16)

General Fund Balance 09/30/2021 \$26,590.81

## Central Kentucky AGA

### Change in Education Fund Balance

Month Ended September 30, 2021

Education Fund Balance 08/31/2021 \$ -

Monthly Receipts \$ -

Monthly Expenses \$ -

Transfer to General Fund

Net Increase (Decrease) in Education Fund Balance -

General Fund Balance 09/30/2021 \$ -



CCU-Checking	6,474.24
CCU-Savings	5.00
CCU-CD	20,111.57
	26,590.81

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# October TREASURER'S REPORT

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## Central Kentucky AGA

### Treasurer's Report

Month Ended October 31, 2021

Reconciled Cash Balance as of 09/30/2021 \$26,590.81

#### General Receipts:

Monthly Program Fees - Cash	
Monthly Program Fees - PayPal	
Monthly Program Fees - Check	
Monthly Program Fees - STRIPE	426.70
Central KY Membership Dues	11.66
Interest Earned - Checking	0.57
Interest Earned - CD	11.92
	<b>450.85</b>

#### Education Receipts:

PDT Training Fees	-
PDT Training Fees - Paypal	-
	<b>-</b>

Total Receipts 450.85

Total Funds Available 27,041.66

Less: Expenses (425.00)

CCU Balance 09/30/2021 **\$26,616.66**

Less: Education Fund Balance -

General Fund Balance 10/31/2021 **\$26,616.66**

#### General Expenses:

Franklin County Humane Society - Stephanie Robey	25.00
Christina Shuffett - exam reimbursement	375.00
Frankfort Independent Schools Education Foundation - Beth Roark	25.00
	<b>425.00</b>

#### Education Expenses:

	-
	<b>-</b>

Total Expenses \$ 425.00

## Central Kentucky AGA

### Change in General Fund Balance

Month Ended October 31, 2021

General Fund Balance 09/30/2021 \$26,590.81

Transfer of Education Fund Balance

Monthly Receipts 450.85

General Expenses 425.00

Net Increase (Decrease) in General Fund Balance 25.85

General Fund Balance 10/31/2021 **\$26,616.66**



## Central Kentucky AGA

### Change in Education Fund Balance

Month Ended October 31, 2021

Education Fund Balance 09/30/2021 \$ -

Monthly Receipts \$ -

Monthly Expenses \$ -

Transfer to General Fund

Net Increase (Decrease) in Education Fund Balance -

General Fund Balance 10/31/2021 \$ -

CCU-Checking	6,488.17
CCU-Savings	5.00
CCU-CD	20,123.49
	<b>26,616.66</b>

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volunteer



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Newsletter material



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

# 2021-2022 Chapter Executive Committee Members

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

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