

# AGA Phoenix Chapter (www.agaphoenix.org)

PY 2017-2018

August 2017



## Message From the President



I hope everybody is enjoying the monsoon weather and the cooler temperatures.

I attended the Professional Development Training in Boston on July 9<sup>th</sup> through July 12<sup>th</sup> with two of our Board members, Mary Adelman and Kim Prendergast. There were over 1,900 attendees from all AGA's chapters around the USA, from federal, state and local governments. The event provided a great opportunity to learn about the new law and standards in accounting and auditing, and technology that continuously influences our work. There were some great classes on leadership, staff development and on the very exciting and hot topic: Cyber Security. And not last a great opportunity to network.

As the Chapter's President, I voted on a few changes to the Bylaws of the AGA, the biggest being the removal of Article V that requires a general membership meeting to vote. Rather, chapter and national leaders represent members and vote at National Board of Directors meetings.

At the PDT our chapter received the Platinum Award, the highest recognition for a great program year.

The PDT emphasized the mission of our association in advancing accountability, transparency and leadership by promoting education, certification, innovation and collaboration across all level of government and to the stakeholders.

On August 3<sup>rd</sup>, the Board is holding a meeting to plan another year of great programs. We are looking for new Board members and new ideas of how to better serve the needs of our members. We are looking for your involvement and feedback. You can reach out to us at [contact@agaphoenix.org](mailto:contact@agaphoenix.org).

On September 13<sup>th</sup> we will resume our monthly meeting. Please check the website for updates to our events: <https://www.agacgfm.org/Chapters/Phoenix/Our-Chapter.aspx>

Thank you for your continuous support! Have a great rest of the summer!

Gergana Kovatcheva, CPA, CGFM

President

AGA Phoenix Chapter

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### CGFM

#### Resources:



- Study guides available to members
- CGFM Review Course Oct 30th—Nov 3rd
- Reimbursement to successful CGFM candidates for exam and app fees

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

Date	Event	Topic	CPE Credit	Registration Dead-line	Location
9/13/17	Chapter Meeting-Lunch 10:30am-11:00am, Audio Conference 11:00am-12:50pm	TBD	2	9/8/17	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
10/11/17	Chapter Meeting-Lunch 10:30am-11:00am, Seminar 11:00am-12:50pm	TBD	2	10/6/17	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
11/15/17	Chapter Meeting-Lunch 11:30am-12:00pm, Audio Conference 12:00pm-1:50pm	TBD	2	11/10/17	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
12/6/17	Chapter Meeting-Lunch 11:30am-12:00pm, Seminar 12:00pm-1:50pm	Holiday Social	2	12/1/17	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
1/10/18	Chapter Meeting-Lunch 11:30am-12:00pm, Seminar 12:00pm-1:50pm	Miller	2	1/5/18	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
1/19/18*	8:00am-8:30am Continental Breakfast 8:30am-12:00pm-Class	Ethics—ASCPA	4	1/12/18	Maricopa Community College 2411 W. 14th Street, 1st Floor—Employee Lounge Tempe, Arizona 85281
2/7/18	Chapter Meeting-Lunch 11:30am-12:00pm, Audio Conference 12:00pm-1:50pm	TBD	2	2/2/18	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
2/16/18*	Chapter Meeting-Lunch 11:30am-12:00pm, Seminar 12:00p-12:50pm	ASRS	1	2/9/18	ASU Skysong Bldg. 3, Synergy II #135 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
	1:00pm-1:50pm	Deferred Comp	1		
	1:50pm-2:40pm	Federal Tax Update	1		
	2:40pm-3:30pm	State Tax Update	1		
	Total		4		
3/7/18	Chapter Meeting-Lunch 11:30am-12:00pm, Audio Conference 12:00pm-1:50pm	TBD	2	3/2/18	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257

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

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

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

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

**Members:**

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

**Non-Members**

\$40 each monthly chapter meeting

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

To RSVP, please go to our online registration site: <http://agaphoenix.eventbrite.com>

Thank you for your interest!

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

## Treasurer's Report

Book Balance 5/31/2017	\$4,607.65
Receipts	\$1,852.85
Disbursements	<u>\$3,058.92</u>
Book Balance 6/30/17	<u>\$3,401.58</u>
Outstanding Checks	\$650.00
Outstanding Deposits	\$0.00
Adjusted Book Balance	<u>\$4,051.58</u>
 <u>Account Balance</u>	
Cash on Hand	\$50.00
Savings Balance	\$5.00
Your Savings Balance	\$472.41
Money Market Account	\$1,164.93
Checking Balance	<u>\$2,359.24</u>
	\$4,051.58
Difference Adjusted Book vs Bank	(\$0.00)

## Balance Sheet

6/30/2017

Cash and Bank Accounts	
Cash on Hand	\$50.00
Savings Balance	\$5.00
Your Savings Balance	\$472.41
Money Market Fund	\$1,164.93
Checking Balance	<u>\$2,359.24</u>
<b>TOTAL Cash and Bank Accounts</b>	<u>\$4,051.58</u>
Inventory	<u>0.00</u>
Speaker Gifts	<u>\$70.00</u>
<b>TOTAL ASSETS</b>	<u>\$4,121.58</u>
<b>LIABILITIES &amp; EQUITY</b>	
<b>TOTAL Liabilities</b>	<u>\$0</u>
<b>Equity</b>	<u>\$4,121.58</u>

# Announcements - Job Postings

*No Postings Currently—Check Back Soon*

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

Please email AGA Phoenix Webmaster, Josh Consier, at [joshc@agaphoenix.org](mailto:joshc@agaphoenix.org)

# AGA Phoenix Chapter Executive Board Program Year 2017-2018

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

**OFFICERS:**

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

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

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

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

## Our Purpose

### Mission Statement

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

### Vision

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

## We'd Love Your Input!

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

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

Please email your news for forthcoming newsletters to:

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





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

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

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

## Membership Referral Program

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

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

## Board Members Wanted

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

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

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

### What is AGA?

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

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

### Benefits of Joining

If you asked a member which of the benefits they value the most, they probably would say education and networking, which often occur at the same time and place. Here are some of our members' favorites:

- Continuing Professional Education and Networking Opportunities
- Keep Up-to-Date on Current Issues
- Keep Abreast of the Latest Technologies and Financial Systems
- Professional Guidance and Certification

### How Can You Join?

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



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

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

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