

AGA – Southwest Virginia Chapter

AGA Southwest Virginia Chapter, P.O. Box 116, Woodlawn, VA 24381
www.agacgfm.org/roanoke

President's Message



By Curtis P. Joachim, CPA, MBA, CGFM, CGMA

Our 2021/2022 AGA year is well underway, as the warmth of summer gives way to shorter days and cooler nights. It is also time to double down on efforts to accomplish the goals that you had established for 2021 if you have not yet achieved them. Being in the 4th quarter of the calendar year, means that the clock has not yet ran out. There is still time, and the ball is still in your court. Dreams do come true if you have the courage to pursue them. Yes, you can!

In September, we kicked off our first monthly meeting of the AGA year. In recognition of September as National Preparedness month, after receiving a brief update from our board members, we had a presentation on Disaster Preparedness for Finance professionals. There were 20 members in attendance who all received 1 CPE.

We are looking forward to this month's meeting scheduled for October 28th where in recognition of October as Cybersecurity Awareness month, we will have a presentation by Randy Sklar from Sklar Technologies on Cybersecurity for 1 CPE. For this presentation, we will use the conferences i/o platform which will automate the attendance tracking and issuing CPE certificates. No more writing down letters 😊. Before the meeting, we will be sending out the conferences i/o link which attendees will use to log into the meeting.

Preparations are well underway for planning the Commonwealth PDT. This is the annual joint training with the Richmond, Shenandoah, VA Peninsula and Southwest VA chapters of AGA. It will be held virtually on Thursday and Friday December 9th and 10th. This year's theme is "Adaptability and Innovation in Challenging Times". You will have an opportunity to earn 16 CPEs including "Ethics" for those with CPA licenses. Do make plans to attend.

If you have not already done so, please take a moment to fill out the annual member satisfaction survey. Let us know how we are doing and what we might be able to do to improve.

As always, thanks for being a member of AGA and supporting our chapter.

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Opportunities & Updates

If you have not already filled out our **AGA Southwest Virginia Chapter Member Satisfaction Survey**, you still have time. We would love your input or suggestions for improving our chapter.

<https://www.surveymonkey.com/r/2GLN89J>

26th Annual AGA Commonwealth Professional Development Training, December 9-10, 2021

‘Adaptability and Innovation in Challenging Times’

Be on the lookout for registration information soon. Interested in Sponsorship or speaking? Contact Kelly Stefanko at agavapen@gmail.com to determine availability.

Doctors Without Borders

Urgent need for
[Financial Administrators](#)

Technology & Transformation Summit

November 18, 2021 | Virtual | 8 CPEs

[Register Online](#)

‘Name the Newsletter’ Contest

We have received your entries and look forward to voting on the new name during our October meeting!



Please join us on **October 28th** for our monthly meeting!

Southwest Virginia Chapter is launching a new social media profile on Facebook. Details coming soon! **#AGASWVA**

[AGA National Event Calendar](#)

[AGA Southwest Virginia Chapter Events](#)

AGA is Community Minded

Holiday Charity

Like in previous years, our chapter will choose a charity to donate \$200 to for the holiday season (plus any additional donations from members if anyone chooses to give).

If any members have Charities or Volunteer Organizations that are near-and-dear to you that you would like for us to consider as the recipient of our donation, please email your suggestions to the Community Service Chair, Leah Kirby, at lkirby@tjgcpas.com.

Thank you!



Member Spotlight

For this month's **Member Spotlight**, we are pleased to introduce:



Karen Watson – Administrative Assistant, The Joachim Group CPAs & Consultants, LLC

- **How long have you been a member of the AGA?** *Two months*
- **Why did you join AGA?** *For a new experience and to understand the accounting field a little better. I am an Administrative Assistant*
- **What is a typical day like for you?** *A typical day is after I get my teenage daughter and myself up and out the door, working then coming home and studying/doing homework during the evening.*
- **How do you define success?** *Success is being able to work at a position that makes you happy and that you can see where you have made a difference or made a change for the better. I always want to leave a position or department better than it was before I came.*
- **What inspires you?** *My daughter.*
- **What is something about you (a fun fact) that not many people know?** *I'm a featured author in an anthology book and am working on my first standalone novel.*
- **What do you enjoy most about AGA?** *Interacting with people, I would normally not have contact with.*

Chapter Information

2021-2022 Chapter Board

Curtis Joachim, President/Education
Karen Watson, Secretary
Vicki Delp, Treasurer
Regina Williams, Accountability
Leah Kirby, Community Service
Misty Hamed, Communications & Newsletter
Joshua Kingery, Membership
Vicky Moore, Webmaster
Gillian Cadogan, National Council of Chapters Representative



New Members

[Chapter Board Contact Information](#)

AGA Treasurer's Report For the Month Ending September 2021

Beginning Balance: September 1, 2021 \$ 8,857.72

Receipts:

No Receipts

Total Receipts \$ -

Disbursements:

9/15/2021	CK#1208	Post Office Box Rental (Annual Fee)	\$	166.00
9/21/2021	EFT	Zoom-Monthly Subscription Fee	\$	15.74
9/30/2021	Debit Card	Vital Source-CGFM Study Guide Rental Fees	\$	100.00

Total Disbursements \$ 281.74

Ending Balance: September 30, 2021

\$ 8,575.98

Balance Reported 10/14/21

Signature: _____

Vicki B. Delp

Treasurer

Balance check

\$ 8,575.98

Per statement

\$ 8,675.98

Vital Source Book Rental Fees (Not Cleared)

Difference

\$ (100.00)

Meeting Minutes

September 28, 2021, 11:50am

Board members in Attendance: Curtis Joachim, Leah Kirby, Karen Watson, Vicki Delp, and Vicky Moore

Approval of Minutes – Last meeting minutes were emailed to the board members. Motion to approve was made by Vicki Delp, and Seconded by Leah Kirby. Minutes were approved.

Treasurer's Report – Vicki Delp. The treasurer's report for September was approved.

Community Service Report - Leah Kirby. The chapter usually makes a cash donation toward the end of the year in November or December as well as in springtime during our Spring PDT. We are still accepting ideas for a charity to give these funds to. We are also still taking suggestions for a charitable event. Some suggestions have been river cleaning, cleaning the tombstones of veterans, and a bread baking charity event.

NCC Rep Report - Gillian Cadogan. We submitted plans and goals for the year to the National Governing board and they have been presented to the National board. There are three more meetings in December, February, and May and this will close out the fiscal year.

Membership and Emerging Leaders Report – Curtis Joachim. In the last year, we have had eight new members. Will continue to reach out and attract new members from local colleges and Universities as well as local government employers. We will be providing a presentation to the National Association of Black Accountants at VA Tech during the month of October.

Communications/Newsletter – Misty Hamed. The first edition of the Newsletter was posted. We are having a contest to determine the name of the newsletter. Check out the "getting to know you" section of the Newsletter and the Member spotlight. Also, we will follow Misty's Journey in the newsletter as she prepares for and takes the CGFM examinations.

Meetings/Education/CGFM – Curtis Joachim. The CGFM study guide is available online. The presentation for November will be how to prepare a CCR and a review of the Chapter's CCR.

Accountability Report- Regina Williams. Reviewed the financial records for the chapter; no issues were identified. Spoke to Wythe County administration and he will prepare a CCR for the County in January. The Chapter CCR will be prepared and submitted to National for the October 31st deadline.

Website- Vicky Moore. The main goal has been to complete the transformation from Roanoke Chapter to Southwest Virginia Chapter. There is a place on the website "Why you are a CGFM" and members are encouraged to respond to that.

Presentation "Disaster Preparedness for the Finance Professional" by Curtis Joachim

Raffle \$25 Gift Card

Adjourn at 12:55 PM

In Other News...



You have read AGA's Code of Ethics, submitted your CGFM application and education requirements, and received your eligibility letter. Next up...Exam Preparation! If you are old-school like me, you go ahead and invest in the paper versions of the study guides. There is nothing like having paper and a blue highlighter (has to be blue) to help me make the most out of studying. If you prefer online study guides, don't forget that our chapter has a set that members can use! Consider yourself warned – the study guide for Exam 2 is a doozy!

There are three comprehensive examinations that candidates must pass: Exam 1 – Governmental Environments, Exam 2 – Governmental Accounting, Financial Reporting, and Budgeting, and Exam 3 – Governmental Financial Management and Control. I have decided to prepare for and take the exams in the following order: 1, 3, and then 2. This seems to be a common approach amongst most candidates. In addition to study guides, I will be attending virtual instructor-led training courses (offered by AGA) for each exam. I would encourage you to check out the section on the CGFM on AGA's website if you have not already. There is so much good information there if you are considering applying. Stay tuned for next months' post further highlighting my preparation for Exam 1 further.

-Misty

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