

The Roanoke Ledger

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

President's Message



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

Happy New Year! I hope that you've had an enjoyable holiday season and that your year is off to a great start. How was your 2019? Did you achieve the goals and dreams that you set for the year? Was 2019 a banner year for you? If so, well done! Now raise the bar. If 2019 was not one that you'd like to re-live, then the New Year is a great time to make changes. If you want 2020 to be different, if you want things to change, if you want different results in 2020, then you have to do things differently. It takes courage to change, but change is a must if you want different results.

December was an exciting month for our chapter as we joined forces with the Richmond, Shenandoah and VA Peninsula Chapters to host the second annual Commonwealth PDT.

In addition to being part of the planning committee our chapter also provided a sponsor and gift baskets for the raffle to raise funds for the UNOS charity which is a network for organ sharing. Four of our chapter members were in attendance. During December we also visited Virginia Tech Accounting Society to talk to students about service in Government financial management and made contributions to our local charities.

January's chapter event is a lunch-time webinar scheduled for January 15th. We will be teaming with the Richmond Chapter to host a 2019 Tax Update for 1 CPE. Be on the lookout for the calendar invite. Hope you can join us.

With the roll of the calendar to a new year, it's time to start seriously planning for our Spring PDT to be held on late April 23, 2020. If you have suggestions for a speaker or you would like to be one of our speakers please let me know. The new year also time to start putting together the team for next year. Make this the year that you step off the sideline and be part of the team making things happen for our chapter. Won't you answer the call?

Till next time, remember life is short, make every day count!



Fall PDT 2019



Inside This Issue

President's Message	1
Opportunities	2
Member Spotlight	3
Community Minded	4
Chapter Information	5
Meeting Minutes	6 - 7

The Roanoke Ledger

Opportunities



Joint AGA Meeting with the Richmond Chapter
January 15, 2020 - Lunch Seminar/Webinar
IRS Tax Update - 1 CPE

Presented by: Lakrisha Watson, Manager and Iris Laws, Senior Associate
Tax Core - Dixon, Hughes, Goodman LLP

Join in-person

Patrick Henry Building - East Reading Room – Capital Square

Join Online

Link: <https://join.freeconferencecall.com/cjoachim>
Online Meeting ID: cjoachim

Join by Telephone:

Dial-in Number: (319) 527-2771 - United States
Access Code: 606984

CGFM Quick Facts

- How do I apply for the CGFM Certification?

Submit a [CGFM program application form and fee](#) online. Please note that checks are not accepted. The non-refundable CGFM application fee is \$70 for AGA members (\$33 for student members), \$99 for nonmembers. AGA membership is not required for the CGFM certification.



Save the Date – Spring PDT

When: Thursday April 23rd, 2020

Place: Roanoke Higher Education Center

CPE's: Earn 8 CPEs



Member Spotlight

This Month the Roanoke Chapters Newsletter is pleased to introduce:



Joshua Levenstein

- 1) How long have you been a member of the AGA? **Since April of 2019**
- 2) Why did you join the AGA? **It is part of the benefit of being an Employee of Joachim Group, CPA's**
- 3) What committee do you currently volunteer with? (Note: This is under the assumption that they're currently serving on a committee.) **Education Chair**
- 4) What do you enjoy most about volunteering? **Organizing the Webinars is satisfying.**
- 5) What is your current occupation? **Financial Business Analyst/Data Analyst**
- 6) What do you love most about Government Accounting? **The stability**
- 7) How do you define success? **Land ownership**
- 8) Who inspires you? **Historical figures, Roman Emperors, War heroes, etc.**
- 9) If you could choose anyone as a mentor, who would you choose? **John D. Rockefeller or Warren Buffet**
- 10) What's one thing - either industry-related or not - you learned in the last month? **I learned more about using Array formulas in Excel, for an Audit tool we are working on.**
- 11) What's something about you (a fun fact) that not many people know? **Before I went to college I worked 60 hours a week as a welder in a factory. During college I spent summers working 20 hours a day on commercial fishing boats in Alaska.**

AGA is Community Minded

Brief from the Membership and Emerging Leaders Committee...

On December 4th, the Roanoke AGA chapter was ably represented by one of our board members, Vicky Moore, who presented to students of the Virginia Tech Accounting Society and discussed accounting careers, the CGFM certificate and AGA membership. Thank you, Vicky, for a wonderful presentation!

Please continue reaching out to your colleagues and friends as we recruit for new members!

CONGRATULATIONS – GILLIAN CADOGAN

Gillian has passed ALL parts of the CGFM Exam.



During December our chapter Donated \$200 to the Ronald McDonald House in Roanoke. Chapter members also matched donations of \$150.00 for total donations of \$350.00. See attached thank you letter. Great Job Everyone!

Looking for more?

For AGA National news, visit: <http://www.agacgfm.org>

For AGA National events, visit: <https://www.agacgfm.org/Training-and-Events/Event-Calendar>

The Roanoke Ledger

Chapter Information

2018-2019 Chapter Board

Curtis Joachim, President
 Vicki Delp, Treasurer
 Melissa Cable, Secretary
 Joshua Levenstein, Education/Meetings
 Gillian Cadogan, Membership/Emerging Leaders
 Leah Kirby, Community Service
 Vicky Moore, Web-Master
 Bradley Vaught, Accountability, Communications & News Letter
 Lal Harter, Nat'l Council of Chapters Representative

[Contact Information for the Chapter Board](#)

New Members

Nishant Grover, Student at VA Tech



AGA Treasurer's Report For the Month Ending December 2019

Beginning Balance: December 1, 2019 **\$ 3,464.27**

Receipts:

No Receipts

Total Receipts \$ -

Disbursements:

12/02/19 - DC	Mule Hell Trading	\$	39.58
	Gift Baskets-PDTRaffle		
12/06/19 - CK # 1118	Vicky Moore	\$	79.00
	Reimbursement for College Presentation		
12/07/19 - DC	Dollar Tree	\$	7.37
	Gift Baskets-PDT Raffle		
12/07/19 - DC	Wal-Mart	\$	7.98
	Gift Baskets-PDT Raffle		
12/12/19 - CK # 1119	Ronald McDonald House	\$	200.00
	Chapter Donation		

Total Disbursements \$ 333.93

Ending Balance: December 31, 2019 **\$ 3,130.34**

Balance Reported 01/07/2020

Signature: Vicki B. Delp
Treasurer

Balance check

	\$	3,130.34
Per statement	\$	3,330.34
Outstanding Check	\$	(200.00)

Find us online

AGA Roanoke Chapter website: <https://www.agacgfm.org/chapters/Roanoke/Home.aspx>

Chapter Executive Committee (CEC) Meeting Minutes

November 21, 2019 (via Conference Call)

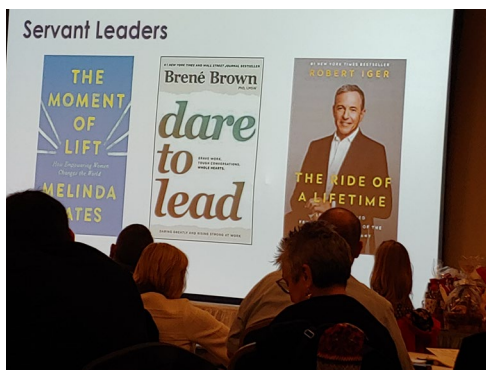
Lunch & Learn: “Grants-A Way Forward through Risk Management & Innovation”

- WELCOME FROM CURTIS
- OCTOBER 2019 MINUTES: These were published in the November 2019 newsletter. There was a motion to approve the minutes as they were published, which carried.
- TREASURER’S REPORT: Our chapter plans to make a \$200.00 donation to the Ronald McDonald House during the 2019 Holiday Season.
- THE 2018-2019 CCR (Citizen Centric Report) for the Roanoke Chapter AGA has been published and can be viewed on the chapter website.
- Curtis Joachim recently gave an AGA presentation at Appalachian State University. There were 45 students in attendance, and we picked up 5 new memberships as a result!
- Please consider attending the 24th Annual AGA Commonwealth of Virginia PDT in Williamsburg: Dec 12-13, 2019 for a total of 16 CPEs. The cost for this event will go up after November 30 so now is a good time to register.
- Each month we will begin spotlighting a member from the Roanoke Chapter in our newsletter. Please consider volunteering to have your unique career and AGA journey highlighted!
- Please continue to review the “Events Calendar” on our Chapter web site for upcoming events.
- We will begin soliciting for 2020 Board Members to serve in the upcoming year (July 1, 2020 –June 30, 2021). Please consider serving your chapter in this capacity.

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Humor and Fun

FUNNY MOMENT AND FUN NUMBERS!!!



Fall 2019 PDT
Williamsburg





Ronald McDonald
House Charities®
Southwest Virginia

Rec'd 1/6/2020

01/02/2020

AGA- Roanoke Chapter
1927 Aspen Drive
Woodlawn, VA 24381

Dear Members of AGA- Roanoke Chapter,

We truly cannot thank you enough for choosing to donate to the Ronald McDonald House of Southwest Virginia. Your donation directly impacts the well-being of families who have critically ill or injured children in the surrounding hospitals. These families depend on us to provide them with a cozy bedroom and home cooked meals, as well as a quiet place to recharge at Carilion Children's Hospital. We are proud to report that in 35 years, contributions like yours have helped us provide comfortable beds for over 20,000 children and families, serve more than 255,500,000 individual meals, and save families approximately \$16,000,000 in hotel expenses.

Your contribution of \$200.00, dated on 12/12/2019 is so generous! It is fully tax deductible thanks to our status as a 501(c3) charity and we acknowledge that no goods or services were provided to you in consideration for your contribution.

Every donation counts when it comes to supporting families of sick, injured, or premature children in Roanoke hospitals. Your generosity makes sure that these families do not have to drive long distances just to visit their kids; instead, they come to the Ronald McDonald House and stay just minutes away from their bedside.

Thank you for keeping families together during such hard times. With this donation, you have become an integral part of our Ronald McDonald House family. We are so glad to have your support and simply cannot do this without you.

With gratitude,

Anna Semonco
Executive Director

Please consider this letter official receipt of your tax deductible contribution on 12/12/2019 in the amount of \$200.00. No goods or services were provided to you in consideration of this gift. Our federal tax identification number is 54-1244769. This organization is a 501(c)(3) tax exempt organization, IRS Section 170(b)(2)(iii) for both federal and state tax purposes.