

AGA Phoenix Chapter (www.agaphoenix.org)

PY 2016-2017

February 2017



Message From the President



Thank you to all who attended our two educational events in January on Municipal Bankruptcies and Professional Ethics Update for Arizona CPAs. We hope that you found these events to be informational. In February we again will provide two educational opportunities.

The first meeting will be held on February 8th at ASU Sky Song and is on the topic of GASB Updates, for two CPE. This meeting will be an audio conference. Lunch begins at 11:30 AM followed by the audio conference at 12 PM.

The second educational event of the month, will be held on Friday, February 17th at ASU Skysong, and is a four hour CPE event, covering ASRS, Deferred Compensation and Tax Updates. Lunch begins at 11:30 AM followed by the educational seminar at 12 PM.

Also, just a reminder that Phoenix AGA will hold its annual Professional Development Conference (PDC) next month on March 31st. This event covers a variety of topics and provides a total of 8 hours of CPE. You can register for the PDC, along with any of our other events at the following URL: <https://www.agaphoenix.eventbrite.com>.

Thank you for supporting the Phoenix Chapter and we look forward to seeing you at the February events! If you have any feedback for us on topics and otherwise, or would like to get more involved with Phoenix AGA, please do not hesitate to let us know. We can be reached at e-mail: aga@agaphoenix.org.

Gergana Kovatcheva, CPA, CGFM

President

AGA Phoenix Chapter

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CGFM Study Resources Available:



For AGA members interested in taking the CGFM please contact our CGFM chair at cgfm@agaphoenix.org for more information. Currently there is 3 complete set of materials available for check out.

Also, successful CGFM candidates can apply for reimbursement of the application and examination costs.

Contact our CGFM chair for step by step instructions on the CGFM process:

cgfm@agaphoenix.org

CGFM Study Group: If you are interested in joining a CGFM Study Group, please contact John Schutter at john.schutter@asu.edu

2/8/17 Meeting (2 CPE)

Topic: GASB Update

Lunch (11:30 AM)

Audio Conference (12:00—1:50 PM)

2/17/17 Meeting (4 CPE)

Topic: ASRS, Deferred Compensation and Tax Update

Lunch (11:30 AM)

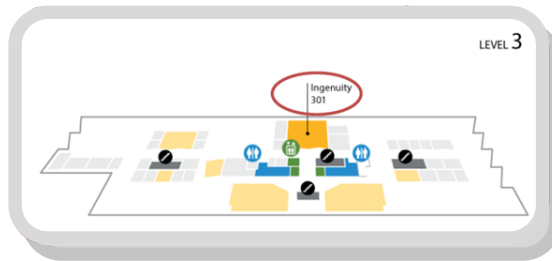
Education Seminar (12:00-3:30 PM)



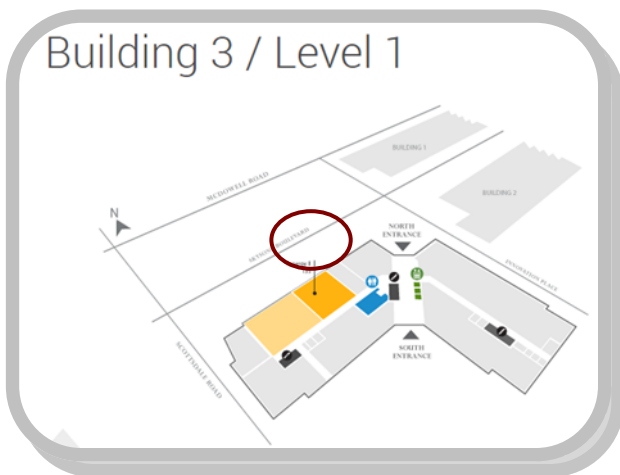
Canned Food Drive: Please support your local, greater Phoenix area food banks by bringing in your canned food items to any meeting, for program year 2016-2017



Bldg 1, Ingenuity Room 301



Bldg 3, Synergy II Room 135



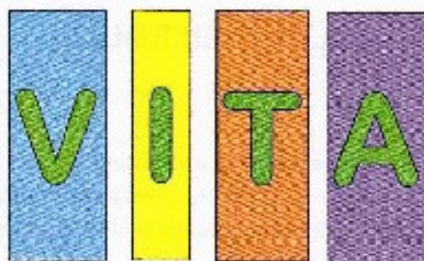
Goals for 2016-2017 and Beyond

- Membership & Education:
 - Provide 36 education credits throughout the program year. Audio conferences and live speakers.
 - Reach out to new members within first month of membership.
 - Reach out to all non-renewing members in May/June.
 - Provide social/recruiting event in Spring.
- Accountability:
 - Prepare chapter’s Citizen Centric Report (CCR) by September 30, 2016 and post to website.
 - Submit chapter’s CCR to AGA’s Certificate of Excellence Review Program.
- CGFM Goals:
 - Continue reimbursements for chapter members who pass all three sessions of the CGFM tests. Reimbursement includes the cost of the three exams and application fee.
 - Communicate and promote CGFM designation to Chapter members .
 - Provide CGFM study guides to members on a first come first serve basis.
 - Seek State proclamation for March as CGFM month and provide recognition to CGFM members.
- Early Career & Scholarship:
 - Reach out to college accounting clubs to present about jobs in governmental accounting and discuss what AGA is and how it can impact students’ careers.
 - Annually award up to two scholarships for students enrolled in an Accounting, Finance or Public Administration curriculum.

PY 2016-2017 Budget	
Education	\$21,250
Membership	\$2,000
Travel	\$3,500
Board Expenses	\$2,000
Scholarship	\$1,500
CGFM	\$1,000
Community Service	\$600
Website	\$500
Early Career	\$100
Total	\$32,450

PY 2016-2017 Committee Members:

- Membership – Mary Adelman
- Newsletter – Michelle Huckabay
- CGFM – Gergana Kovatcheva
- Scholarship – Leslie De’Reche
- Education – Keith Orr
- Programs – Leslie De’Reche/Mary Adelman (back-up)
- Community Service – John Schutter
- Early Career – Open
- Website – Karie Tepper/Josh Consier



Volunteer Income Tax Assistance

VOLUNTEERS NEEDED!

- The VITA program prepares tax returns for free for low-to-moderate income individuals and families.
- Volunteers receive **FREE** training in how to prepare a basic tax return.
- There are a variety of volunteer opportunities within the VITA program; tax preparers, greeters, site coordinators and instructors.
- The tax preparation sites are located throughout the city of Phoenix with various dates and times of operation.
- Becoming a VITA Volunteer provides **satisfaction** of helping others.

For more information or to volunteer, contact Briselda Rodriguez at 602-534-0543 or go to volunteer.phoenix.gov and search VITA



City of Phoenix

For more information or a copy of this publication in an alternative format, contact 602-252-4570 voice.
The city's TTY Relay phone number 7-1-1 may be used if needed.

**Association of Government Accountants
Phoenix Chapter
Education and Meeting Plan
2016-2017 Program Year**

Date	Event	Topic	CPE Credit	Registration Dead-line	Location
9/14/16	Chapter Meeting-Lunch 10:30am-11:00am, Audio Conference 11:00am-12:50pm	Avoiding Surprises and Assessing Risks: Building on Today's Internal Controls	2	9/9/2016	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
10/12/2016	Chapter Meeting-Lunch 10:30am-11:00am, Audio Conference 11:00am-12:50pm	Cyber / Big Data	2	10/7/2016	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
11/16/2016	Chapter Meeting-Lunch 11:30am-12:00pm, Audio Conference 12:00pm-1:50pm	Tools and Strategies for Fighting Fraud	2	11/11/16	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
12/7/2016	Chapter Meeting-Lunch 11:30am-12:00pm, Seminar 12:00pm-1:50pm	Holiday Social / Diversity	2	12/2/16	ASU Skysong Bldg. 3, Synergy II #135 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
1/18/2017	Chapter Meeting-Lunch 11:30am-12:00pm, Live 12:00pm-1:50pm	Municipal Bankruptcies: Lessons Learned	2	1/13/17	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
1/20/17*	8:00am-8:30am Continental Breakfast 8:30am-12:00pm Class	Ethics—ASCPA	4	1/13/17	Marcopa Community College 2411 W. 14th Street, 1st Floor—Employee Lounge Tempe, Arizona 85281
2/8/2017	Chapter Meeting-Lunch 11:30am-12:00pm, Audio Conference 12:00pm-1:50pm	GASB	2	2/3/17	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
2/17/2017	Chapter Meeting-Lunch 11:30am-12:00pm, Seminar 12:00p-12:50pm	ASRS	1	2/10/2017	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		
3/8/2017	Chapter Meeting-Lunch 11:30am-12:00pm, Seminar 12:00pm-1:50pm	TBD	2	3/3/2017	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257

**Association of Government Accountants
Phoenix Chapter
Education and Meeting Plan
2016-2017 Program Year**

Date	Event	Topic	CPE Credit	Registration Deadline	Location
3/31/2017*	8:00am-4:00pm PDC	TBD		3/24/2017	Rio Salado College 2323 W. 14th St. Tempe, AZ 85281
		Total	8		
4/12/2017	Chapter Meeting- Lunch 10:30am- 11:00am, Audio Con- ference 11:00am- 12:50pm	Ethics	2	4/7/2017	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
5/17/2017	Chapter Meeting- Lunch 10:30am- 11:00am, Seminar 11:00am-12:50pm	TBD	2	5/12/2017	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
6/14/2017	Chapter Meeting- Lunch 10:30am- 11:00am, Audio Con- ference 11:00am- 12:50pm	Fraud / Data Analytics	2	6/9/2017	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:

\$20 each monthly chapter meeting, or package deal—\$180 for all sessions*

Non-Members

\$35 each monthly chapter meeting

*excludes special events (Ethics and Professional Development Conference—PDC)

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

Thank you for your interest!

AGA Phoenix Chapter, Treasurer's Reports - December 2016

Treasurer's Report

Book Balance 11/30/2016	\$6,649.57
Receipts	\$1,172.82
Disbursements	\$1,914.89
Book Balance 12/31/16	\$5,907.50
Outstanding Checks	\$27.03
Outstanding Deposits	\$0.00
Adjusted Book Balance	\$5,880.47
<u>Account Balance</u>	
Cash on Hand	\$50.00
Savings Balance	\$5.00
Your Savings Balance	\$440.14
Money Market Account	\$3,164.38
Checking Balance	\$2,247.98
	\$5,907.50
Difference Adjusted Book vs Bank	(\$27.03)

Balance Sheet

12/31/2016

Cash and Bank Accounts	
Cash on Hand	\$50.00
Savings Balance	\$5.00
Your Savings Balance	\$440.14
Money Market Fund	\$3,164.38
Checking Balance	\$2,247.98
TOTAL Cash and Bank Accounts	\$5,907.50
Inventory	\$22.98
Donated Gift Cards	\$0.00
Speaker Gifts	\$0.00
TOTAL ASSETS	\$5,930.48
LIABILITIES & EQUITY	
TOTAL Liabilities	\$0
Equity	\$5,930.48

Announcements - Job Postings

No current postings—try back soon

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

Please email AGA Phoenix Webmaster, Karie Tepper, at webmaster@agaphoenix.org.

Webmaster Volunteer Needed

Looking for a volunteer to become Webmaster. Responsibilities include maintaining all news and information on the Phoenix Chapter Website. Knowledge of HTML and WordPress are preferred, but not required as the AGA National Office is coming out with new tools to assist in maintaining Chapter websites. The current Webmaster will be available for guidance. If interested, please let one of the board members know at any of our Chapter meetings or contact webmaster@agaphoenix.org and aga@agaphoenix.org.

AGA Phoenix Chapter Executive Board Program Year 2016-2017

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	Josh Neidigh

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

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

EMAIL: AGA@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:

newsletter@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: aga@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.

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.****