



AGA™

EAST TENNESSEE
CHAPTER

The East Tennessee Times

🧠 President's Message 🧠

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AGA President Message for February 2022

Happy Valentine's Day! It's hard to believe that the short month of February is already here. If your January was like mine, it raced by! I guess time flies when you're having fun, right? Most of you may know by now but Punxsutawney Phil predicted six more weeks of winter ahead of us. Here's some good news for those ready for warmer days, statistics show Phil's accuracy rate is between 35%-41%. Time will tell if he got it right this year. However, you can be 100% certain that your Chapter Board continues to work diligently to bring you relevant content and quality networking opportunities.

With that said, it's time to renew! By now you've received a membership renewal notice from AGA. Renewal is easy and fast. Just log in at the [AGA website](#) to renew online. Do you work with someone who's not a member? Encourage them to join so they too can enjoy the membership benefits of AGA. Each Chapter member has the opportunity to receive CPE on a variety of topics and discounts on AGA conferences and events. Let's not forget the most important benefit – access to a great network of public servants and friends!

This month we will be hosting Kelley McNeal from the University of Tennessee – Institute for Public Service – County Technical Assistance Service (CTAS). She will be presenting on the University of Tennessee Institute for Public Service and its various agencies. Kelley is a CTAS Training Consultant and has served as an Information Systems Auditor with the Comptroller of the Treasury's Division of Local Government Audit.

We hope to see you at Calhoun's this month. Bring a friend!

Travis Lowe, AGA East Tennessee President

February 2022 Meeting

**Tuesday,
Feb. 8, 2022
11:30 AM**



Kelley McNeal
Univ. of TN CTAS



Agenda

11:30 Registration/Networking
11:30 – 12:10 Lunch
12:10 – 1:00 Presentation

Calhoun's on the River

401 Neyland Drive
865-673-3399

Menu

Meat & Cheese Tray
Chicken Almond Soup
Spinach Artichoke Dip with Chips
Garden Tray & 7-Layer Salad
Pasta Vegetable Salad & Potato Salad
Bread & Rolls

Cost

\$10.00 (member)
\$15.00 (non-member)

Please contact Patti Rebholz
to make your reservation by
Friday, Feb. 4, 2022

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AGA National News

AGA Web Conferences: CPE Simplified

Looking for a way to stretch your training budget? AGA Web Conferences make earning CPE hours easy and affordable. Web conferences feature experts on a variety of government financial management and performance topics. Each event includes time for participants to ask questions and receive answers from the presenters. The web conferences are held on **Wednesdays from 2–3:50 p.m. ET, cost \$59.**

Upcoming Web Conferences

Feb 2	GASB Update	2 CPE
Mar 2	Improper Payments	2 CPE

Recruit a Member

Did you know that a large percentage of new members join AGA simply because someone invited them?

As a valued member, you can impact the future of AGA by sharing your experience with your peers, your staff and others in your organization with an interest in government financial management. No one knows better than a current AGA member how beneficial membership is to advancing government accountability.

There are recognition and rewards for recruiting such as sponsor lapel pin for one or more new members, special recognition in AGA publications and at AGA events. You could even become the next recruiter of the year by recruiting the most new members from April 1st thru March 31st of any given year.

21-22 National Events Calendar

Feb. 23-24, 2022	National Leadership Training	14-CPE Hybrid Wash DC
Jul. 17-20, 2022	PDT-Professional Development Training	24-CPE Anaheim or Virtual
Sep. 20-21, 2022	Internal Control & Fraud Prevention Training	14-CPE Washington DC

Chapter News

January's Secretary Report

The January meeting of the East TN AGA Chapter was held on January 11, 2022, held virtually and in-person at Calhoun's on the River. President Travis Lowe opened the meeting and invited those in attendance to the lunch buffet. Mr. Lowe then introduced our speakers, Nathan Woods and Sam Paganelli, from Rather and Kittrell. Mr. Woods was on site at Calhoun's while Mr. Paganelli presented virtually.

Mr. Woods opened with a brief history of Rather and Kittrell mentioning that they were founded in May 2000 with two employees. They now have 36 team members and have served more than 800 families for in depth financial planning. He then discussed charitable contribution strategies used to avoid certain taxes. Donor advised funds and qualified charitable distributions are two recommended approaches. He followed this with a quick retirement plan benchmarking discussion.

Mr. Woods then introduced Sam Paganelli. Mr. Paganelli discussed behavioral finance and how human emotions can hurt investment performance. Investors tend to overreact with market changes and sell or buy at the worst possible times. He then discussed how investment advisors can help the investor stay on track with their investment goals and keep their emotions out of decision making.

After the presentation, President Lowe announced how the Chapter met our matching pledge goal from the December meeting of \$1,500 for KARM. He thanked everyone for attending and then closed the meeting.

Karen McGee, Secretary

FINANCIAL INFORMATION



Treasurer Connie Cook reported the bank balance as of Febraury 1, 2022 as \$ 13,040.93.

East Tennessee AGA Chapter Officers 2021-2022

President:	Travis Lowe
Past President:	Astra Cope
Webmaster:	Emily Strange
Treasurer:	Connie Cook
Secretary:	Karen McKee
Historian:	Amy Paganelli
Membership:	Robin Shelton
Education:	Dennis Green
CGFM:	Deb Strahler
	Mary McDonald
Awards:	Ginger Giffin
Accountability:	Gary Mitchell
Community Service:	Thaddeus Grace
Early Careers:	Nicholas Fitts
Newsletter Editor:	Deb Strahler
Research:	Larry Elmore
Chapter Recognition:	Mary McDonald
Meetings:	Patti Rebholz
Social Media:	Chandni Dularam
President - Elect:	

EAST TENNESSEE CHAPTER OFFICER OPPORTUNITIES

There is always an opportunity for anyone of you to take a position as a board member.

Chapter Member Promotions

- \$250 to Member passing the CGFM
- Bring a first time guest to a Chapter Meeting and both member and guest eat free

February Speaker

Kelley McNeal, CCFO Training Consultant

University of Tennessee - CTAS

Kelley McNeal is a CCFO Training Consultant with the University of Tennessee (UT) County Technical Assistance Service (CTAS). CTAS is an agency of the UT Institute for Public Service. The CCFO (County Certified Finance Officer) is a program that provides Tennessee's county financial officers an opportunity to learn about accounting and financial reporting principles and enhance their skills in order to carry out their responsibilities for the fiscal affairs of their county or department. CTAS administers the educational program and testing to achieve the CCFO designation certified by the Comptroller of the Treasury.

Prior to joining CTAS in July 2018, Kelley worked as an Information Systems Auditor with the Comptroller of the Treasury's Division of Local Government Audit for 23 years. During her time with the Comptroller's office, Kelley performed information system reviews in conjunction with financial audits in 23 counties in the Upper Cumberland and Sequatchie Valley areas of state.

Kelley holds a Bachelor of Business Administration in Accounting and a Master of Business Administration with an accounting concentration from Tennessee Technological University.

She has served as an adjunct faculty member at Nashville State Community College in Cookeville and Tennessee Technological University. Kelley is a Certified Public Accountant, Certified Government Financial Manager and Certified Professional in Training Management. She is a member of the AGA, TSCPA, AICPA, and TGFOA.

Kelley is a Paul Harris Fellow and charter member of the Rotary Club of Cookeville – Sunset. She has served as the PR Director, Vice President, President, and is currently the Past-President. Kelley is very active in club projects and fundraisers. She is one of the regular actors in the club's annual Murder Mystery which raises funds that benefit her community.

BECOME A CGFM TODAY!!!

The Certified Government Financial Manager - The Mark of Excellence in Federal, State and Local Government.

Since its inception in 1994, the CGFM has become the standard by which government financial management professionals are measured. Its education, experience and ethics requirements have served to elevate the most seasoned financial professionals. More than 14,000 individuals have received the designation so far. Now it's your turn. Experience the benefits of certification first hand—the CGFM is the mark of excellence in your profession. We look forward to adding your name to our distinguished list of Certified Government Financial Managers.

Recent research has shown that employers attribute their recruiting difficulties to a shortage of qualified professionals. Give yourself a competitive advantage by showing your commitment to lifelong learning. You need a credential that shows you are qualified and have the skills to lead. The Certified Government Financial Manager (CGFM) does this like no other credential.

The CGFM is the first certification broad enough to cover the whole field of government financial management—federal, state and local. It measures a wide range of knowledge and skills that a professional needs to succeed in the federal government financial environment, or to meet the unique challenges faced by state and local government financial managers

Learn more about how to become a CGFM at <http://www.agacgfm.org/cgfm/whyearn/default.aspx>.

CGFM Exam Preparation Courses

What:	Course 1	Course 2	Course 3
Where:	Virtual, live	Virtual, live	Virtual, live
When:	Jan. 13-14, 2022	Jan. 25-28, 2022	Feb. 8-10, 2022
	10:30am – 2:30pm each day	10:30am – 3:30pm each day	10:30am – 3:30pm each day
Cost:	\$325 per person	\$725 per person	\$525 per person
Deadline:	1/6/22	1/18/22	2/1/22

CGFM Self-Study Alternatives

Study Guides offers by AGA: Course 1 \$95, Course 2 \$115 and Course 3 \$105

Another option is online self-paced training: Course 1 - \$225

Course 2 - \$625

Course 3 - \$425