

AGA Government Financial Management Spring Workshop

April 25, 2024 | 8 CPE Hours
Rockville, Maryland

It's about being effective and successful

What to expect?

An outstanding program is planned with dynamic speakers from the Federal Government, Regulators, and Professional Service Firms who will present new ideas in informative sessions.

Workshop participants can earn up to 8 CPE hours as follows:

- Accounting (Governmental) – Technical – 3.0 CPE hours
- Personal Development – Non-technical – 1.5 CPE hours
- Finance – Technical – 2.5 CPE hours
- Computer Software & Application – 1 CPE hour



AGA Montgomery/Prince Georges County Chapter is registered with National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPESponsors. State boards of accountancy have the final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website www.nasbaregistry.org



Details

Location:

TFC Consulting, Inc
First Floor Conference Center
9200 Corporate Blvd
Rockville, Maryland 20850

Learning Objectives:

Participants will learn new management techniques and practical tips to increase efficiency in government financial operations.

Discussion Topics:

- FASAB Update
- AI Savvy: Generative Artificial Intelligence (GenAI)
- The Financial Report of the U.S. Government: An Update
- Using the Social Style® Framework to be a Better Leader
- Government Financial Management's Perspective: Risks and Challenges in Government Agencies
- Beyond the Numbers: Leveraging the Green Book for Operational Excellence
- Government Contractors' Perspective: Risks and Challenges in Government Agencies

Advance Preparations:

None

Program Level:

Overview

Delivery Method:

Group Live

Who Should Attend:

- All Levels
- Auditors, Accountants, Financial Managers
- CPAs, CGFMs, ACCAs, IMAs, CMAs

Note: No media/press are invited nor allowed to cover this event.

Prerequisites:

None



Pricing

AGA Montgomery/PG Chapter,
IMA, & ACCA Members \$40

AGA Members
of Other Chapters \$55

Non-AGA, Non-IMA &
Non-ACCA Members \$65

Students Free



Sign me up!

Registration

Please register at: <https://form.jotform.com/240527945777167>

Meeting Policy

Refund policy: AGA Montgomery/PG Chapter cannot offer refunds and all transactions are final.

Attendance Policy

- To receive the 8 CPE hours you must attend the presentation from 8:00 a.m.–5:00 p.m.

For more information regarding complaint policies, please visit www.marylandaga.com



Program

7:30 a.m.–8:00 a.m.

8:00 a.m.–8:15 a.m.

8:15 a.m.–9:05 a.m.

9:05 a.m.–9:55 a.m.

9:55 a.m.–10:10 a.m.

10:10 a.m.–11:00 a.m.

11:00 a.m.–12:15 p.m.

12:15 a.m.–1:15 p.m.

1:15 p.m.–2:30p.m.

2:30 p.m.–3:20p.m.

3:20 p.m.–3:35 p.m.

3:35 p.m.–4:35 p.m.

4:35 p.m.–5:00 p.m.

Agenda

Registration and Breakfast

Opening Remarks

Claire Fitch, President AGA – Montgomery/Prince George's County Chapter (MPG)

Julie Missimore, Head of Public Affairs – ACCA Americas

Brandon Schweitzer, IMA UMGC

FASAB Update

Speakers: Leigha Kiger and Alan Perry, FASAB

AI Savvy: Generative Artificial Intelligence (GenAI)

Speakers: Johnny Clerkley, Nathaniel Bussey, Farhan Qureshi, Deloitte & Touche LLP

Break

The Financial Report of the U.S. Government: An Update

Speaker: Scott Bell, U.S. Department of Treasury

Using the Social Style® Framework to be a Better Leader

Speaker: Phil Moore, Kearney & Company

Lunch

Government Financial Management's Perspective: Risks and Challenges in Government Agencies

Moderator: Monica Valentine, FASAB

Panelists: Atisha Burks, FPS DHS; Childim Okonkwo, NASA; Julie Tao, DOC; Michael Wetklow, NSF

Beyond the Numbers: Leveraging the Green Book for Operational Excellence

Speakers: Lena Jang, KPMG LLP and Eric Rasmussen, KPMG LLP, and Past President AGA MPG Chapter

Break

Government Contractors' Perspective: Risks and Challenges in Government Agencies

Moderator: Doreen Shute, CliftonLarsonAllen LLP and Past President AGA MPG Chapter

Panelists: Reza Mahbod, RMA Associates, LLC; Tashu Trivedi, TFC Consulting, Inc.; and Yehuda Schmidt, Sikich LLP and Past President MPG Chapter

Closing Remarks and Distribution of CPE Certificates

Education Directors: Carol-Ann Boothe, Maggie Huang, Oluwatoyin Ojumu, and Chelsea Swann

Sponsor Appreciation

Platinum level



CliftonLarsonAllen

Gold level



ALLMOND & COMPANY, LLC



Think Ahead

Silver level



Bronze level



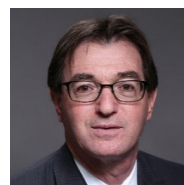
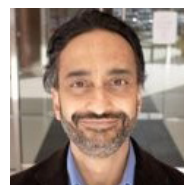
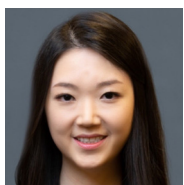
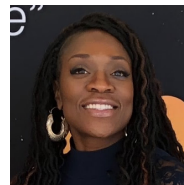
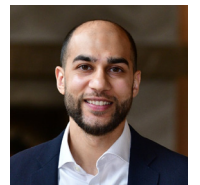
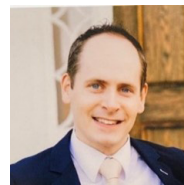
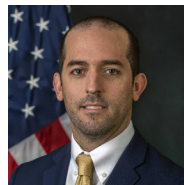
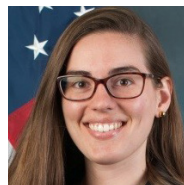
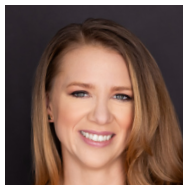
Friend level



Auditors. Consultants. Advisors.



Speaker Bios





Julie Missimore

The Association of Chartered Certified Accountants

Julie is a well-versed public and external affairs professional who has been advising key decision makers and stakeholders on behalf of ACCA since October 2012. Julie currently serves as the Head of Public Affairs – Americas for ACCA, managing ACCA's government relations and thought leadership throughout the North America, Caribbean and Latin America.

Prior to joining ACCA, Julie represented and advised both established and up-and-coming political candidates, parties, and major influencers on US government ethics laws as a Reporting Specialist with leading law firms. Julie also maintained a watchful eye on key competitors and potential policies that may have a significant impact on her clients' advocacy initiatives and campaigns. Julie has bachelor's degrees in political science and economics from The American University and holds a master's in public policy from George Mason University.



Brandon Schweitzer

University of Maryland Global Campus/Institute of Management Accountants (IMA)

Dr. Schweitzer, ACUE, earned recognition for excellence in teaching from the Association of College and University Educators based on core competencies and effective practice. Dr. Schweitzer earned his Doctor of Philosophy in Management-Accounting at Walden University, Minneapolis, MN. His Dissertation Title, "Jet Fuel Hedging and Modern Financial Theory in the U.S. Airline Industry," focuses on unit management and finance, practice, and theory. Dr. Schweitzer earned his Master of Business Administration in Management at Hawaii Pacific University, Honolulu, Hawaii. Dr. Schweitzer's thesis, "Business Plan Development for the Restaurant Industry in Waikiki," illustrates his interest in business development. He also earned a Bachelor of Science in International Business Administration from Hawaii Pacific University, Honolulu, Hawaii. Each academic accomplishment brings Dr. Schweitzer to his current role as Associate Professor of Accounting at the University of Maryland, Global Campus. Dr. Schweitzer current teaching focuses on undergraduate principles of accounting, cost accounting, and accounting information systems courses.

Dr. Schweitzer is energetic, with several years of experience in the accounting and managerial professions. Dr. Schweitzer's principal strengths include self-starting, managing, problem-solving, project management, and managing multiple tasks. Dr. Schweitzer also holds exceptional organization, communication, and implementation skills. His responsibilities have included overall management of all aspects of finance and accounting operations, supervision of employees, and financial reporting and analysis preparation. Dr. Schweitzer has been a VP of Finance and Accounting, Controller, Assistant Controller, and General Manager. Dr. Schweitzer's experiences contribute to the scholar-practitioner model used in his classroom. He has been a university educator and administrator since 2013 and works in research and consulting activities.

Dr. Schweitzer is Vice President of Academic Outreach for the Nation's Capital IMA Chapter 0044. He is a former Potomac and Chesapeake IMA Council Delegate to the IMA Global Roundtable Committee. Dr. Schweitzer also serves as an IMA Campus Influencer, seeking to expand connections with students and faculty at area college and university campuses.



Leigha Kiger

Federal Accounting Standards Advisory Board

Leigha Kiger joined FASAB in 2015 as the organization's first communications specialist. Ms. Kiger assists in the development of Board publications by editing for clarity, consistency, and uniformity. She also manages internal and external communications, including meeting minutes, newsletters, listserv messages, and FASAB's website content. Ms. Kiger frequently presents in-person and virtually at conferences on topics including FASAB project updates, plain language writing, and effectively communicating financial information.

Before joining FASAB, Ms. Kiger participated in AmeriCorps VISTA, a national service program overseen by the Corporation for National and Community Service. During her year of service, she piloted and coordinated the first financial literacy program of its kind at a local non-profit in Florida. Ms. Kiger graduated from Duke University with a Bachelor of Arts degree in English. She is a member of the AGA and serves as the head webmaster for the DC chapter.



Ricky A. Perry, Jr.

Federal Accounting Standards Advisory Board

Ricky is an assistant director on the technical staff of the Federal Accounting Standards Advisory Board. In his role, he manages Board projects on lease accounting and implementation. Ricky also serves as the staff liaison to the Accounting and Auditing Policy Committee—a permanent committee that develops and recommends implementation guidance solutions for the federal financial management community under the supervision of the Board.

Prior to joining the FASAB staff, Ricky worked at the Government Accountability Office, where he managed federal financial audits, audited certain federal disaster relief and tax credit programs, and assessed government-wide payment integrity processes and strategies. While with GAO, Ricky detailed with the Board, managing its tax expenditures project and supporting education and outreach efforts.

Ricky is a Certified Public Accountant licensed in the State of North Carolina and a Certified Government Financial Manager. Ricky is an active member of AGA, serving as a Board member for its Certificate of Excellence in Accountability Reporting (CEAR) program. He holds a master's degree in accounting from North Carolina State University.



Johnny Clerkley

Deloitte & Touche LLP

Johnny has more than 18 years of audit and advisory experience in the Federal Government space with DoD, DoJ and Intel agencies, with An emphasis leading complex financial engagements with a focus on financial statement audits and preparation, contract auditing, and audit remediation efforts.

Johnny is technically proficient in Cost Accounting Standards (CAS), Federal Acquisition Regulation (FAR), and OMB Circular A-123 and A-136, Financial Reporting Requirements and Internal Control Systems Audits, as well as Internal Control Requirements to include experience in Improper Payment and Internal Controls over Financial Reporting.



Nathaniel Bussey

Deloitte & Touche LLP

Nathaniel is an Advisory Manager with over 15 years of broad professional experience in Finance, Accounting, Information Technology, and Audit Readiness. He is a Certified Information Systems Auditor (CISA) and has supported a myriad of Defense, Security, and Justice (DS&J) agencies including: The US ARMY, US NAVY, Drug Enforcement Administration (DEA), Federal Bureau of Investigation (FBI), and the US Courts. He has over 10 years of hands-on OMB A-123, Audit Readiness, and commercial audit experience, and specializes in Information Systems compliance.

Additionally, Nathaniel serves as Deloitte's DS&J Sector Champion Deputy for Artificial Intelligence (AI), with the aim of advancing AI offerings across the following DS&J subsectors: Intel, Justice, Homeland, and Defense.



Farhan Qureshi

Deloitte & Touche LLP

Farhan is an AI and Analytics Manager in Deloitte's government and public sector practice with more than eight years of experience helping federal agencies navigate and solve complex data challenges using technology-driven solutions. With a deep understanding of both the technical and strategic aspects of AI and Analytics, Farhan develops and implements cutting-edge solutions that drive efficiency, automate business processes, and leverage data for strategic decision-making.

Farhan has led numerous projects that have resulted in significant cost savings, improved operational effectiveness, and increased mission impact for federal agencies. Farhan is known for his ability to collaborate effectively with cross-functional teams, communicate complex technical concepts into easily understandable terms, and deliver innovative solutions.

Farhan is a Certified Public Accountant (CPA) and hold a B.S. and M.S. in accounting from George Mason University. Farhan's expertise extends across a wide range of areas, including data management, machine learning, predictive analytics, and data visualization. Farhan is committed to helping federal agencies harness the power of AI to achieve their goals and to teach others drive positive change through AI and Analytics.



Scott Bell

U.S. Department of Treasury

Scott is a Senior Staff Accountant in the Department of the Treasury, where he works on the Financial Report of the U.S. Government, is a featured speaker on the Federal Government's financial position and condition and is Treasury's representative on the Federal Accounting Standards Advisory Board (FASAB).

Scott's career in federal financial management and policy spans more than 30 years in both the public and private sectors, including positions with the Office of Management and Budget, the Department of Health and Human Services, and the Small Business Administration.

Scott, a Certified Government Financial Manager (CGFM), has served in many volunteer leadership positions with the Association of Government Accountants (AGA), and was an adjunct professor of federal accounting and reporting at George Mason University. He earned a B.S. in Accounting from Washington and Lee University and an MBA from George Mason University.



Phil Moore

Kearney & Company

Phil is a Partner and the IT Assurance Practice leader at Kearney & Company. Phil has over 22 years of professional Information Technology (IT) assurance, financial, and consulting experience, including work in both civilian and defense federal agencies.

Phil is a Certified Public Accountant (CPA), a Certified Information Systems Auditor (CISA), and Project Management Professional (PMP).



Monica R. Valentine

Federal Accounting Standards Advisory Board

Monica is the Executive Director of the Federal Accounting Standards Advisory Board (FASAB) and chair of the Accounting and Auditing Policy Committee (AAPC), a permanent committee of FASAB. Monica serves as the technical director and program administrator for FASAB. Technical activities include developing accounting standards for federal government departments and agencies as well as responding to inquiries regarding the application of accounting standards. Monica also manages the research staff supporting Board deliberations and serves as the principal advisor to the chair and Board.

Prior to her position as FASAB Executive Director, Monica served as a FASAB Assistant Director leading the Board's staff work on the classified activities and lease accounting projects. Monica also worked on the accounting standards for liabilities and natural resources, as well as other related FASAB Interpretations, Technical Bulletins, and Technical Releases. Monica was also the lead staff member for the AAPC.

Prior to joining the FASAB staff in 1991, Monica was an Audit Manager with the public accounting firm of KPMG. Monica served several different audit client industries while with KPMG, such as the banking, education, nonprofit, and local government industries. Monica is a Certified Public Accountant in the District of Columbia and a Certified Government Financial Manager. Monica graduated with honors from Howard University receiving a bachelor's degree in business administration with a concentration in accounting. Monica is a member of the Association of Government Accountants.

Monica is married and the mother of three grown children.



Atisha Burks

Federal Protective Service U.S. Department of Homeland Security

As Chief Financial Officer (CFO) for the Federal Protective Service, Atisha leads actions to sustain and improve business operations to meet FPS' goals. Atisha provides executive leadership in financial management, acquisitions, and risk management, and ensures that the result of financial transactions are analyzed and interpreted to determine the impact upon FPS resources.

Atisha previously served as a Senior Leader (Financial Operations) with the Department of Navy, Chief of Financial Reporting, Policy, and Property with the U.S. Coast Guard and most of her career at the Department of Commerce where she served as the Department's Director of Financial Reporting and Policy.



Chidilim Okonkwo

National Aeronautics and Space Administration

Chidilim “Chi” is Director of Agency Financial Systems at NASA Headquarters Office of the Chief Financial Officer (OCFO) leading the modernization of the Agency’s budget and financial management application portfolio across the CFO Enterprise made up of 9 Centers including the massive upgrade of NASA’s core financial management system. Chi has experience supporting innovative financial system implementations as a Systems Accountant at NASA and gained experience modernizing Federal legacy systems prior to joining NASA at the Office of Personnel Management (OPM) and BearingPoint.

Advocate of continuous innovation, Chi is energized by the adoption of emerging technology to transform customer experiences and empower the federal workforce of the future utilizing secure and intelligent platforms, tools and services. Chi is an active member of NASA’s IT Systems Transformation, Agency Software Management as well as Enterprise Digital Transformation teams established to assess and explore cutting edge capabilities to enhance NASA mission success and outcomes.

Chi is a Certified Government Financial Manager and holds a Bachelor of Business Administration in Accounting from Howard University and Dual Master of Science in Accounting and Information Technology from the University of Maryland. She is a Fellow of the American Council for Technology - Industry Advisory Council (ACT-IAC) Partners 2022 class.



Julie Tao

U.S. Department of Commerce

Julie Tao is the Director of Office of Financial Reporting, Internal Controls, and Travel at Department of Commerce Office of Financial Management. Julie’s office is responsible for formulating and prescribing and implementing Department-wide financial management, accounting and fiscal policies, procedures, standards include coordinating preparation of financial statements and other external reporting.

Julie’s office also coordinates the annual financial audit, monitors the resolution of audit findings, and oversees the Department’s assessment of A-123 internal controls over financial reporting. In addition, Julie is the Department’s Senior Travel Official who is responsible for providing policy, oversight, guidance, and reporting of all travel and conference-related activities.



Michael Wetklow

National Science Foundation

Mike currently serves as NSF's Deputy CFO and Division Director for Financial Management and is focused on transforming financial management functions and workforces to include RPA, artificial intelligence, blockchain, cybersecurity, data science, and enterprise risk management. Prior to this work, he was the principal author of OMB Circular No. A-123, *Management's Responsibility for Enterprise Risk Management and Internal Control*.

While at the Department of Homeland Security, Mike eliminated pervasive material weaknesses and obtained the agency's first financial statement opinion in FY 2011. He recently completed a master's degree in data science at the University of Virginia, holds an MPA in public sector finance and a B.S. in accounting from the University of Maryland at College Park.

Mike is an adjunct professor position at George Mason University and serves on an accounting curriculum advisory board at Northern Virginia Community College. In his spare time, he is an aspiring bassist and enjoys spending time with his wife and three sons.



Lena Jang

KPMG LLP

Lena is a CPA and is a manager in KPMG's federal audit service line with more than five years of progressive experience performing integrated audits to federal agencies. She is passionate about technology capabilities in audit and serves as the national Audit Chat Lead for the federal service line, leading the deployment effort of generative AI tools into the practice.

Lena graduated from George Mason University (GMU) in 2018 with two degrees: a B.S. in Accounting and a B.S. in Information Systems and Operations Management. During her studies at GMU, she spent over two years working as a tax intern at a local CPA firm and completed an internship in KPMG's Commercial Audit Practice.

Lena is a member of AGA's Washington D.C. Chapter and Ascend's Greater Washington Chapter. She is bilingual in English and Korean, and hopes to one day add a third one.



Eric Rasmussen

KPMG LLP

Eric is an audit partner at KPMG LLP with over 31 years of public accounting experience. Eric leads the audits of several federal government agencies including one of the few integrated audits in the federal government, which includes an audit opinion on internal controls. He also has significant experience auditing manufacturing, transportation, and supply chain management companies including the nation's largest diesel fuel retailer. Eric enjoys working with people and leads the Culture committee for his practice.

Eric is a past Regional Vice-President, past Chapter President and past Chair and current member of the Accounting and Auditing Committee of AGA's Corporate Partner Advisory Group. He has regularly helped organize AGA's Enterprise Risk Management workshop that annually brings together leading risk management specialists in the federal government.

Eric is currently an audit committee member and executive board member of the National Capital Area Council of the Boy Scouts of America where he served as Treasurer for six years.

Eric is a graduate of Utah State University where he earned both his Master of Accountancy and his Bachelor of Arts in Accounting.

In his free time, Eric and his wife Michelle, both enjoy spoiling their ten grandchildren.



Doreen Shute

CliftonLarsonAllen

Doreen, CPA, CGFM, is the current managing principal of CLA's Federal Government Solutions team, she serves as a career coach and on the Inspired Careers committee to develop inspired career journeys/experiences for CLA family members. She encourages others to shadow her, bringing peers into meetings and walking them through the execution of new tasks. Rarely does she give away answers to difficult questions, instead encouraging others to research the solution. Through mentoring, Doreen hopes to delegate, empower, and help federal financial professionals prioritize their time and goals as they grow in their careers. Outside of CLA, Doreen has been a leader in other professional activities and in community service at leadership levels including Habitat for Humanity and the AGA.

In her more than 20 years of experience serving the federal government sector, Doreen has well over a decade of upper management and partner-level experience performing consulting and audit services for a variety of clients, including large, complex federal government agencies. She specializes in Federal reporting and data analysis, auditing, accounting operations, and consulting with an emphasis on federal agencies. Doreen has worked with over 15 agencies providing advice and guidance in complex financial management, accounting, and auditing issues.

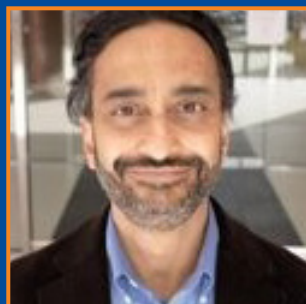
Lastly, Doreen is an active member of professional organizations such as the Association of Government Accountants (AGA), American Institute of CPAs, and Maryland Association of CPAs. She has served the AGA in many national and chapter roles including but not limited to the AGA National Treasurer (2022-2023) elect and as past president and board member for the Montgomery/Prince George's County Chapter. Doreen was recognized by the AGA with the Andy Barr Award in 2020, and the National President's Award in 2016. In 2007, Doreen was named a SmartCPA by Washington SmartCEO Magazine.



Reza Mahbod

RMA Associates

Reza is RMA's founder and has approximately 30 years of audit and consulting experience. As a Partner level professional at RMA, Reza is responsible for overall firm management and leads many of RMA's audit and consulting engagements. Reza is passionate about the growth of RMA's personnel and delivering high-quality work for RMA's clients. Outside of work, Reza enjoys spending time with family, learning new things, improving existing skills, and staying active.



Tashu Trivedi

TFC Consulting, Inc.

Tashu is the President and CEO of TFC Consulting Inc., a CPA firm based in Rockville, MD. Since its establishment in 2002, TFC has provided outstanding financial management and compliance services, serving over 35 federal agencies, including many large CFO Act agencies. Tashu began his accounting and management consulting career at Lavenhol and Horwath, followed by approximately 10 years at KPMG, before founding TFC to apply his knowledge in financial audits, internal control assessments, and risk management within the federal sector.

Tashu holds degrees from the University of Maryland, the University of Chicago Booth School of Business, and the London School of Economics, covering Accounting, Business Administration, and Development Management, respectively. He actively contributes to professional organizations such as the AGA and ASMC and is a licensed CPA in Maryland and Virginia.

Known for his passion for innovation and efficiency, Tashu continually seeks ways to streamline operations and implement technology solutions that add value. Outside of work he enjoys family time, hiking, carpentry, and tinkering with cars.



Yehuda Schmidt

Sikich LLP

Yehuda has 30 years' experience in assisting federal government agencies with finance, accounting, business process improvement, information technology (IT) controls, and program management. Yehuda has extensive experience in managing reviews of internal controls over financial reporting, operational controls, and risk management in compliance with Office of Management and Budget (OMB) Circular A-123. Yehuda is leading client's IT risk assessments in compliance with NIST SP 800-37, and IT assessment in compliance with NIST SP 800-53.

Yehuda holds an MBA in Finance and Entrepreneurship, and B.Sc. in Accounting and Economics from the Hebrew University of Jerusalem, Israel. Yehuda is a Certified Public Accountant (CPA), a Certified Information Systems Auditor (CISA), a Certified Risk and Information Systems (CRISC), and Certified Governance of Enterprise IT (CGEIT).

Education Directors



Carol-Ann Boothe



Maggie Huang



Oluwatoyin Ojumu



Chelsea Swann

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