

# PDT 2022 MAY 18 & MAY 19

**AGIA**  
Albuquerque &  
New Mexico  
Chapters



## Wednesday, May 18th, 2022

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|---|--------------------------|
| <b>Opening Session</b>  | <b>8:15am—9:30am</b>     |
| <b>1st Morning Breakouts</b>  | <b>9:45am—11:00am</b>    |
| * Financial Statement Preparation: Part 1 by Laura Beltran-Schmitz, CPA, CGFM, CFE, CICA of CLA     |                          |
| * RFP's: A Brief Overview by Susan Inman of NM State Purchasing                                     |                          |
| * Fraud: The Other Employee Benefit by Ryan Luetkemeyer, CPA & Michael McGinley, CPA of Moss Adams  |                          |
| <b>2nd Morning Breakouts</b>  | <b>11:10am – 12:00pm</b> |
| * Accounting for Diversity and Inclusion by Koen Alberts, CPA & Lauren Casias, CPA of Moss Adams    |                          |
| * 2022 Legislative Update by NM Taxation and Revenue Secretary Stephanie Schardin Clarke            |                          |
| * Elements of an ACFR by Alan D. Bowers, Jr., CPA, CITP of CRI                                      |                          |
| <b>1st Afternoon Breakouts</b>  | <b>1:45pm—3:00pm</b>     |
| * Financial Statement Preparation: Part 2 by Laura Beltran-Schmitz, CPA, CGFM, CFE, CICA of CLA     |                          |
| * State Controller's Update by Donna Montoya Trujillo of DFA  |                          |
| * GASB 87: Practical Lease Implementation by Danny Martinez, CPA, CGFM of BKD                       |                          |
| <b>2nd Afternoon Breakouts</b>  | <b>3:25pm—4:40pm</b>     |
| * Findings Report by Elena Tercero, Laura Wade & Monique Hurtado of the Office of the State Auditor |                          |
| * NM State Budget Overview by Andrew Miner of the NM DFA State Budget Division                      |                          |
| * Cybersecurity Risk for 2022 by Randall Romes, CISSP, CRISC, CISA, MCP, PCI-QSA of CLA             |                          |

## Thursday May 19th, 2022

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|---|------------------------|
| <b>Opening Session</b>  | <b>8:15am—9:30am</b>   |
| <b>1st Morning Breakouts</b>  | <b>9:45am—11:00am</b>  |
| * Excel: Tips and Tricks by Ben Martinez, CPA of Central New Mexico Community College     |                        |
| * Single Audit Update by Jane Tinker CPA of CLA   |                        |
| * Session Topic and Speaker TBD   |                        |
| <b>2nd Morning Breakouts</b>  | <b>11:10am—12:00pm</b> |
| * State Ethics Overview by Jeremy Farris, DPhil, J.D. of the State Ethics Commission      |                        |
| * Impact of Fraud on Business by Janet Pacheco- Morton CPA, CGFM                          |                        |
| * CGFM Informational Session by Kusum Adhikari, CGFM of OSA and Javier Machuca, CPA, CGFM |                        |
| <b>1st Afternoon Breakouts</b>  | <b>1:45pm—3:00pm</b>   |
| * Leadership & Ethics by Audrey Jaramillo, CPA, CFE of Jaramillo Accounting Group         |                        |
| * IPRA, Transparency & Public Records by Ethan Watson of the City of Albuquerque          |                        |
| * Accounting Foundations: Internal Controls by Alan D. Bowers, Jr., CPA, CITP of CRI      |                        |
| <b>2nd Afternoon Breakouts</b>  | <b>3:25pm—4:40pm</b>   |
| * IT & Cybersecurity by Jaime Rumbaoa, CPA, CITP, CFE, CISA of Axiom                      |                        |
| * Accounting Standards Update by Gerry Boaz, CPA, CGFM, CGMA AGA National President       |                        |
| * Fraud—Jeopardy by Alanna Goodman, CFE & David Mora, CFE of the OSA                      |                        |