

Who are We?

Our Chapter was established in **1957**, making it one of the oldest in the Country! The San Antonio Chapter is comprised of professionals within the **Federal, State, Local, and Private sector**. Additionally, our network provides members the ability to reach out to professionals across the nation. AGA is the member organization for government financial management professionals. We lead and encourage change that benefits our field and all citizens. Our training events, professional certification, publications and ongoing education help members build their skills and advance their careers.

Locally, our **Mission** is to broaden AGA's outreach, educate our members, and provide community service; while our **Vision** to empower the greater San Antonio area's government financial managers to work together for a better community.

To meet our **Strategic Goals** for 2023-2024, we held **Monthly CPE events** with a minimum of 10 attendees who rated their **satisfaction** of the event at a 5 out of 5 ✓ We **grew our membership** by over 10 percent, with fully engaged members ✓. We encouraged members to become **CGFMs** by supporting the **Midwest Study Group** ✓ We are **communicating** through email, maintaining an updated Web site, Facebook, and a Linked-in page ✓ In addition, we held **one charity fundraiser** in connection with a meeting ✓ We also **reached out to potential new members**, and our **host** for meetings has stepped up as **President-Elect for 2024-2025** ✓

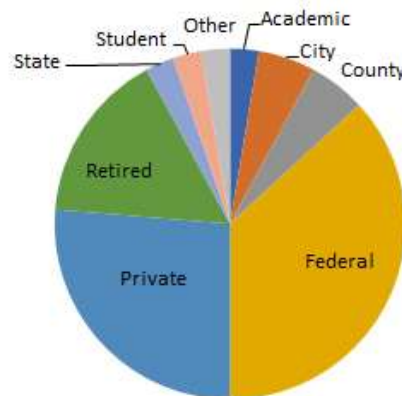


As of **31 March 2024**, we had **38 members** in the following fields, holding one or more professional certifications:

Certifications



Employers



Contact our leadership at aga.satx@yahoo.com

2023-2024 Chapter Officers

| | |
|------------------------|--|
| President | Alice S. Hufnagle, CGFM(Ret) CPA(Ret) CFE(Ret) |
| Past President | Mary Lou Saldivar, CGFM |
| Treasurer | Rafael Perez, CGFM CPA |
| Secretary | Julio C. Elizondo, Jr. MSF |
| Membership/NCC | Gwendolyn R Sewell, CGFM |
| Education | Ronald G Prather CGFM Christopher A Goeman CGFM CPA |
| Social Media/Webmaster | Blanca Castro |

2024-2025 Chapter Officers

| | |
|---------------------------------|---|
| President | Julio C. Elizondo, Jr. MSF |
| Immediate Past President | A.S. Hufnagle |
| Past President | Mary Lou Saldivar, CGFM |
| Treasurer | Rafael Perez, CGFM CPA |
| Membership/NCC | Gwendolyn R Sewell, CGFM |
| Education | Ronald G Prather CGFM Jean Morris MPAC |
| Social Media/Webmaster/ACE Rptg | A.S. Hufnagle |

Website: <https://www.agacgfm.org/sanantonio>

Facebook: <https://www.facebook.com/AGACGFM.SA/>

LinkedIn: <https://www.linkedin.com/company/aga-san-antonio-chapter/>

How are we Doing?

At the beginning of the **2023-2024** year, we began our **post-COVID revitalization effort!** After several **Zoom sessions with AGA National** personnel, an **August 2023 Happy Hour** at Stone Werks Big Rock Grille, and input from a combination of seasoned and new members, we hosted **ten lunch/training meetings**, with an average of **9 in-person attendees** and **26 virtual attendees** throughout **12 states!**



12/14/23 – Toys for Tots Collection
at Artificial Intelligence Training



For our efforts, we were recognized with an Achievements in Chapter Excellence **GOLD Award** at the July 2024 **Professional Development Training** for our accomplishments!



3/14/24 Fraud Training provided
by Jaye Wells, CFE
had 70 Virtual Registrants

Membership Growth
Starting out with only 27 members (one of whom had passed away in 2015), we boasted 43 members by June 2024! During the September – February Membership Campaign, we **exceeded our 10% goal – we grew 60%!**

Our President-Elect, **Julio C. Elizondo, Jr**, also received the **Volunteer-of-the-Year Award** at the **2024 Denver PDT!**



11/9/23 Thanks to the Bexar County
Tax Assessor-Collector's Office

Lunch was a minimal \$15 per member, and training was free. The **Alamo Area Council of Governments** graciously hosted our meetings with Videoteleconference capabilities.



1/16/24 – Yellow Book Update from
Yellow Book Advisory Council Member
Corrie Stokes, Austin City Auditor
60 Virtual attendees signed up!



Financial Information



Our chapter has been a Nonprofit 501(c)(3) organization since May 1991. A 501(c)(3) is defined as an organization for, among others, educational, charitable, and scientific purposes. As such, **we aren't in the business to make money**, but rather to earn enough to allow us to offer no- or low-cost professional development, education and training, and networking opportunities to our members.

We file an annual **Form 990**, Return of Organization Exempt From Income Tax with the IRS. Our annual financial statements are **reviewed by an independent member of the chapter**, who has assured us that all funds have been properly used and accounted for.



Revenues

Our primary source of revenue comes from member dues to AGA National. For an average of 30 non-retiree members, this equals about \$450 annually.



Other income comes from members registering for a meeting at which we provide lunch, and our goal is to collect only as much as we spend on food.

We also earn a minimal amount of **interest income** on bank deposits.



Expenses

Our primary expenses are to maintain sponsorship certification with the **Texas State Board of Public Accountancy**, which has been \$400 annually for the last several years. This allows our training to be recognized as Continuing Professional Education (CPE) for Texas CPAs, as well as for several other certifications, such as the CGFM.



Other expenses are for **food** served at member meetings.

| | FY 23 | FY 24 | Increase (Decrease) | Budget FY 25 |
|-----------------------|-----------------|-------------------|---------------------|--------------------------|
| Revenues | | | | |
| AGA Chapter Dues | \$428.75 | \$390.00 | (\$38.75) | 30 active x \$15 = \$450 |
| Luncheon Income | \$ -- | 799.23 | 799.23 | (5 x \$15) x 10 = 750 |
| Dividend Income | 1.23 | 1.13 | (.10) | \$1.00 |
| Total Revenue | \$429.98 | \$1,190.36 | \$760.38 | \$1,201 |
| Expenses | | | | |
| TSBPA | \$400.00 | \$400.00 | - | \$400 |
| Luncheon Food | - | 764.57 | \$764.57 | \$75 x 10 = \$750 |
| Total Expenses | \$400.00 | \$1,164.57 | \$764.57 | \$1,150 |
| Net Income | \$29.98 | \$25.79 | (\$4.19) | \$51 |

See Website <https://www.agacgfm.org/sanantonio> for detailed financial statements.

What's Next?

As we build our chapter, our **2024-2025 Strategic Plan** has set additional goals of **engaging with and educating students and young professionals** to create leaders of tomorrow.

We have a robust schedule of **monthly luncheon meetings with free CPEs**, supplemented with **virtual access** for our remote attendees.



New Chapter President Julio C. Elizondo, Jr (left) with attendees for our **10/7/24** meeting exploring the Alamo Area Council of Governments' broad reach



Passing of the Gavel
at **8/13/24** Happy Hour

We are again meeting at the Alamo Area Council of Governments (**AACOG**) **Building** at 410 & Perrin Beitel in San Antonio, tentatively the **second Thursday of the month through June 2025**.

We are holding **after-action/pre-planning CEC Zoom** meetings on the **third Tuesday of the month**.

We have the following **luncheon/training events** planned for the rest of the year:

- Thursday, November 14, 2024 – **Cybersecurity** – Presented by **Guidehouse** at their **San Antonio location**.
- Thursday, December 12, 2024 – **Holiday Luncheon** with **Toys for Tots** Collection
- Tuesday, January 7, 2025 – **Single Audit** - Presented by Christopher Goeman, CPA, CGFM, Director, National Assurance Technical Group, State and Local Government, **CLA** (CliftonLarsonAllen LLP)
- Thursday, February 13, 2025 and possible **joint 2+ day training session** with the **Society of Defense Financial Management** (formerly the American Society of Military Comptrollers) February 25-27
- Wednesday, March 12, 2025
- Monday, April 7, 2025
- Wednesday, May 7, 2025
- Thursday, June 12, 2025

See our Web site for information regarding our next local event. <https://www.agacgfm.org/sanantonio>
How are we doing? Let us know at aga.satx@yahoo.com

Stay Connected!



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<https://www.linkedin.com/company/aga-san-antonio-chapter/>