



Renewals Townhall

January 2026



National Staff

Membership Manager

Meredith Newman

Membership Assistant

Julia Robinson

Meetings & Membership Coordinator

Susi Revelo

Chief Operations Officer

Susan Fritzlen

Chapter Services Manager

Dana Rodgers

Director of Professional Certification

Katya Silver, ICE-CCP

CGFM Retention Manager

Crystal Robinson

Today's Agenda

- The Basics
- What do Chapter Officers need to know?
- CGFM certification renewal process
- Retention: A Year-Round Process
- Q & A

Renewing AGA Membership and CGFM Certification

The Basics

Member Types: paid

- **Early Career (EC)**
 - Individuals with fewer than **3 years** of **ANY** work experience.
 - Changing employers does not qualify someone for Early Career membership.
- **Government (G)**
 - For individuals who work **directly** for the government, academia and not-for-profit organizations.
 - Being employed by a private entity as a contractor for a government agency does **not** qualify for Government membership.
- **Private Sector (P)**
 - For individuals working for private companies, corporations or partnerships.
- **Retired (R)**
 - For individuals who are retired and **not working** in the field of financial management.

Member Types: free

- **Student**

- These free memberships are for students who have not worked in financial management for 12 months or more. *(updated eligibility this year)*
- Internships (paid or unpaid) do not count as gainfully employed.
- Student Membership must be renewed every year.
- New student members must **join** in addition to creating a free account.

- **Professor**

- One-year free membership to AGA for **full-time** professors.
- Membership includes assignment to the nearest AGA chapter.
- Academicians who are current or former AGA members are not eligible.

How to Renew

Log in to My AGA (my.agacgfm.org)

Username is email or AGA ID#

Review Automatic Renewal setting

 the line items to be paid

Click 



Ms. Meredith Newman
Membership Manager
AGA
ID: 172896 Member since: 6/1/2022
Account type: Government Member Membership paid thru: 3/31/2026

- Renewal
- Profile
- Events
- Payments
- Committees and Groups

Automatic Renewal

You are not enrolled in automatic payments. To enroll, proceed to the cart and select the option at checkout.

2026-2027 Renewal

Note for AGA members: By paying your membership renewal fee(s) or participating in autorenewal, you affirm your agreement and compliance with [AGA's Code of Ethics](#).

Note for CGFMs: By paying your CGFM renewal fee or participating in autorenewal, you affirm your agreement and compliance with [AGA's Code of Ethics](#) and [CGFM CPE Requirements](#). The CGFM annual renewal fee is **discounted from \$85 to \$40 for AGA members** and requires membership dues to be paid by the deadline below.

All membership dues and CGFM renewal fees are due by 3/31/2026.

If you are enrolled in autorenewal, your card will automatically be charged on March 19, 2026.

Pay	Invoice	Date	Description	Due Date	Amount	Balance Due
<input checked="" type="checkbox"/>	Cash-172896	1/27/2026	Membership Renewal		100.00	100.00

Total balance due 100.00

Total selected 100.00







Automatic Renewals

on Renewal tab:

Automatic Renewal

You are not enrolled in automatic payments. To enroll, proceed to the cart and select the option at checkout.

in cart at checkout:

Renewal Options

- Single payment
- Automatically pay future renewals

By selecting this option, I agree to allow my payment details to be securely stored for my future use.

Make selection in shopping cart

Only items in the cart will be set up for automatic renewal

Automatic renewals will be processed on March 19, 2026

Checkout

Payment options include card or ACH

Online payments are
faster
more secure
provide instant confirmation

Payment method

ACH Payment ▾

VISA

Master Card

Discover

American Express

ACH Payment

*Use a paper check to pay **online** (or over the phone)*

New!

AGA Members and CGFMs will receive their invoice as a **PDF via email** across several days in early February

or download from My AGA – wait time is known issue

available in account history as well

Members who need a paper invoice mailed to them must select online or communicate with National.

Renewing AGA Membership and CGFM Certification

What do
chapter leaders
need to know?

Chapter Dues

- Members submit national and chapter dues together.
- Chapter dues are disbursed to chapters via ACH transfer on a quarterly basis.
 - Last week in April: Chapters receive dues for January through March
 - Last week in July: Chapters receive dues for April through June
 - Last week in October: Chapters receive dues for July through September
 - Last week in January: Chapters receive dues for October through December

Questions about ACH?

- Contact finance@agacgfm.org

Need to update your chapter's banking info?

- Visit [Chapter Resources](#) and download the ACH form for chapters

Submitting dues for multiple members

Important Notes:

- Renewals and new memberships will be activated only when processed by National Office
- Please collect a personal email address for each member!

We encourage all members to log in to my.agacgfm.org at least once a year to review contact information, check their balance, and more. This year brings a new, streamlined My AGA!

Submitting dues for multiple members

Memberships not yet renewed will be suspended on April 1, 2026.

When a suspended member's renewal payment is processed at AGA National, they will immediately be reinstated with no penalty.

This most affects CGFMs, who will owe \$85 instead of \$40 for their CGFM renewal if they are suspended. Members who are also CGFMs will have the designation at the end of their name on your Membership Reports.

Membership Reports are linked to the AGA database for the most up-to-date information.



Interim Renewals

Last summer we switched from second-year to first-year proration, so there are no more interim renewals.

Members who joined before December 1, 2025 are expected to renew by March 31.

Those who joined in November 2025 paid 5/12 of annual dues and will be billed for a full year of dues for renewal. Hopefully they recognize the value of their five months so far!

Advantage Groups

Groups combine members from one workplace onto **one invoice**

- includes National dues, Chapter dues, and CGFM renewals
- more efficient, saves staff time for reimbursements

Designated coordinator from the workplace to

- update the group roster annually
- communicate with AGA National Staff
- submit payment

Should your workplace form a group? Contact Julia Robinson
jrobinson@agacgfm.org

Advantage Groups

“First, it is an honor for our division to participate as (AGA) members. The opportunity to join as an Advantage group is better success for us. It allows us to drop and add new members when necessary, without it being a hassle for the individual member, the group, or our AGA Representative. Thank you for serving us rather efficiently.”



Debra M. Harris
Administrative Assistant to the Vice President
Florida Agricultural and Mechanical University

“It has made the payment process easier. There are fewer vouchers to process, members are renewed timely, therefore making this method very efficient.”



Barbara Lawson
Investment Accountant
Public Employees' Retirement System of MS

Renewing AGA Membership and CGFM Certification

CGFM certification
renewal process

CGFM Certification Renewal Overview

Only **active** CGFMs can renew their certification.

Only CGFMs who have met the CPE requirement can renew their CGFM.

No CPE documentation needs to accompany the renewal payment. CGFMs may be selected for a CPE audit and need to keep their CPE documentation for at least three years.

More information on CPE and active status requirements can be found at www.agacgfm.org/CGFM/maintain

Renewing Membership *and* CGFM

CGFM renewals are due every year by **March 31** – same as membership.

If your chapter receives CGFM renewal payments, forward to National **as soon as possible**.

The CGFM renewal fee is discounted from \$85 to \$40 for AGA members and requires the membership fee to be paid **by the renewal deadline**.

Suspended members will be billed for and must pay the nonmember CGFM renewal fee of \$85.

Retired or Inactive CGFM Status

Retired status

- Available for both membership and certification
- Must fit definition
 - “permanently retired from AND are not working in the field of financial management”
- Contact AGA staff to request retired status (will apply to membership and certification, cannot be separated)

Inactive Status

- CGFM will switch to inactive status if requirements to maintain active or retired are not met

For more information on CGFM retired or inactive status, including usage of CGFM and reactivation requirements, please see www.agacgfm.org/CGFM/maintain

Questions? Contact cgfm@agacgfm.org

My CGFM

my.agacgfm.org/MyCGFM

Manage your CPEs for
CGFM renewal here:

My CPE

AGA National CPE Hours

This record comes from AGA National. CPE hours earned through AGA's national training events can be used to fulfill CGFM CPE requirements.

2026 2025 2024 2023 2022 2021

Training Title	Date	CPE Hours
There are no records.		

CPE Hours from Other Entities

You can add CPEs earned from other organizations (including AGA Chapters) here. Submitted CPEs are only stored for the most recent five-year period.

NOTE: these CPEs are for your records only and will not be reviewed by AGA National for applicability towards CGFM, unless you are selected for a CPE audit and submit your CPE records to AGA National for review.

[Add Other CPEs](#) [Manage Other CPEs](#)

2026 2025 2024 2023 2022 2021

Training Title	Date	Sponsoring Org	CPE Hours	CPE Topics
There are no records.				

CPE Totals

Below you'll find the total number of CPEs for your current, and if applicable, previous CPE cycle. **NOTE:** These totals are based on your AGA and other uploaded CPEs, and are for your records only. They have not been verified or approved by AGA. If you are selected for a CPE audit for your CGFM, this information can be used to submit your CPE records to AGA National for review.

More Information

www.agacgfm.org/webinar/how-to-maintain-your-cgfm/

March 12, 2026

2-2:45 pm ET

Open to CGFMs and those
curious about the process

CGFM Webinar

**How to Maintain
Your CGFM**

Renewing AGA Membership and CGFM Certification

Retention:
A Year-Round
Process

Phew! Everyone renewed their membership – we can turn our focus elsewhere until next year!

Not so fast...

Member Retention

What does retention mean?

- Getting your members involved, connected and engaged.
- Make sure members are aware of the benefits available to them.
- Everyone is busy – make sure to check in on your community!
- This can be a good time for a survey

Chapter activities promote retention

- Develop new skills
 - leadership and business management
 - membership development/recruiting
 - website and technology
 - chapter newsletters
 - event planning and organization
 - financial management
- Network
- Senior leaders
- Give back

Use the next 12 months to retain members

- Appoint a Membership Chair or co-chairs
- Know the benefits, be able to discuss
- Have regular touch points:
 - Welcome new members right away
 - Distribute a newsletter
 - Contact on anniversary
- Highlight members in newsletter/website/social media, offer awards and recognition
- Ask your fellow chapter leaders to make personal outreach to members
- Hand out logo merchandise – creates sense of belonging

Optional:

Set up a time to meet with Meredith to celebrate accomplishments, plan for success, and brainstorm new ideas!

[book a call with Meredith](#)
mnewman@agacgfm.org

Renewing AGA Membership and CGFM Certification

Q & A