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# Table of Contents

- The Hilton Norfolk the Main Hotel Floor Plan .................................................. 2
- Spring Conference Schedule ............................................................................. 3
- VGFOA Executive Board 2017-2018 ................................................................. 7
- List of VGFOA Past Presidents ....................................................................... 8
- List of CPFO’s .................................................................................................. 10
- List of VGFOA and Radford University GNAC Certificate Recipients .......... 11
  - GFOA Update ............................................................................................... 16
  - U.S. Economic Update ................................................................................ 17
  - Virginia Economic Forecast ....................................................................... 18
  - Speed Networking ....................................................................................... 19
  - Keynote Session - The Number One Thing That Holds Us Back ............... 20
  - GASB Update .............................................................................................. 21
  - VRS - Employer Update ............................................................................. 22
  - Revenue and Expense Recognition ............................................................. 23
  - Cyber Security - Risk Management ............................................................. 24
  - Cherry Bekaert's Annual Local Government Benchmarking Study Results .. 25
  - Innovation in the Public Sector ................................................................. 26
  - What Drives Health Care Cost and How to Contain It ................................ 27
  - Green Infrastructure Financing ................................................................. 28
  - 50 Shades of Fraud ..................................................................................... 29
  - GASB 75 Reporting ..................................................................................... 30
  - Investment Policy Development .................................................................. 31
  - Cooperative Contracts .............................................................................. 32
  - Implementing the Green Book .................................................................... 33
  - Rating Agency Panel .................................................................................. 34
  - Virginia CPA Ethics: 2018 Required Course (Separate fee of $65) .......... 35
  - Financial Policy Development ................................................................... 36
  - APA - Local Government Update ............................................................... 37
  - Yes, You are a Fiduciary ............................................................................ 38
- Spring Conference Sponsors ........................................................................... 39
- Spring Conference Exhibitors ......................................................................... 45
# VGFOA 2018 Spring Conference Schedule

## Wednesday, May 23rd

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>12:00pm – 4:00pm</td>
<td>Registration Open</td>
<td>Foyer</td>
</tr>
<tr>
<td>1:05pm – 1:55pm</td>
<td>GFOA Update</td>
<td>Salons D, E</td>
</tr>
<tr>
<td></td>
<td>- Michele Levine, GFOA</td>
<td></td>
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<tr>
<td>2:05pm – 2:55pm</td>
<td>U.S. Economic Update</td>
<td>Salons D, E</td>
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<tr>
<td></td>
<td>- Mark Vitner, Wells Fargo Financial Services</td>
<td></td>
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<tr>
<td>2:55pm – 3:10pm</td>
<td>Break</td>
<td>Salons A, B, C</td>
</tr>
<tr>
<td>3:15pm – 4:05pm</td>
<td>Virginia Economic Forecast</td>
<td>Salons D, E</td>
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<tr>
<td></td>
<td>- Robert McNab, Old Dominion University</td>
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<tr>
<td>4:15pm – 5:05pm</td>
<td>Speed Networking</td>
<td>Salons D, E</td>
</tr>
<tr>
<td></td>
<td>- Stephanie Jones, Virginia Resources Authority</td>
<td></td>
</tr>
<tr>
<td>6:00pm – 7:00pm</td>
<td>Reception</td>
<td>The Grain</td>
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</table>

## Thursday, May 24th

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00am – 4:00pm</td>
<td>Registration Open</td>
<td>Foyer</td>
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<tr>
<td>7:00m – 8:00am</td>
<td>Breakfast</td>
<td>Grandby</td>
</tr>
<tr>
<td>8:00am – 9:50am</td>
<td>Presentation of Flag</td>
<td>Salons D, E</td>
</tr>
<tr>
<td></td>
<td>VGFOA Welcome Address</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Diane Bergeron, VGFOA President</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Welcome Address from City of Norfolk</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Douglas Smith, City Manager</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Keynote Session: The Number One Thing That Holds Us Back</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Sunjay Nath</td>
<td></td>
</tr>
<tr>
<td>9:50am – 10:00am</td>
<td>Break</td>
<td>Salons A, B, C</td>
</tr>
<tr>
<td>10:00am – 10:50am</td>
<td>GASB Update</td>
<td>Salons D, E</td>
</tr>
<tr>
<td></td>
<td>- Paulina Haro, GASB</td>
<td></td>
</tr>
</tbody>
</table>
Thursday, May 24th Continued…

10:55am – 11:45am
**VRS - Employer Update**
- Barry Faison, Virginia Retirement System

12:00pm – 1:15pm
**Lunch and Awards**

**Concurrent Sessions:**

1:30pm – 2:20pm
**Revenue and Expense Recognition**
- Paulina Haro, GASB

1:30pm – 2:20pm
**Cyber Security - Risk Management**
- Cindy Gross, Brown Edwards & Company, LLP

1:30pm – 2:20pm
**Cherry Bekaert’s Annual Benchmarking Survey Results**
- Rob Churchman, Cherry Bekaert, LLP

**Concurrent Sessions:**

2:25pm – 3:15pm
**Innovation in the Public Sector**
- Rachel Westerfield and Matthew Burnham, Accenture Management Consulting

2:25pm – 3:15pm
**What Drives Health Care Cost and How to Contain It**
- Kerry Smith and Nick Allen, USI Insurance Services

2:25pm – 3:15pm
**Green Infrastructure Financing**
- Shawn Crumlish, Virginia Resources Authority; Carolyn duPont, Quantified Ventures; Gauri Gadgil, Chesapeake Bay Foundation

3:15pm – 3:25pm
**Break**

**Concurrent Sessions:**

3:25pm – 4:15pm
**50 Shades of Fraud**
- William Pounds, Cherry Bekaert, LLP

3:25pm – 4:15pm
**GASB 75 Reporting**
- Daniel Homan and William Dowd, SageView

3:25pm – 4:15pm
**Investment Policy Development**
- Kathleen Bowe, PFM Asset Management LLC
Thursday, May 24th Continued…

Concurrent Sessions:

4:20pm – 5:10pm  
*Cooperative Contracts*  
- Eugene Anderson, Norfolk State University

4:20pm – 5:10pm  
*Implementing the Green Book*  
- Sean Walker, CliftonLarsonAllen, LLP

4:20pm – 5:10pm  
*Rating Agency Panel*  
- Parker Montgomery, Fitch Ratings; Evan Hess, Moody’s; Tim Barrett, S&P

6:00pm – 7:00pm  
*Foyer*  
*Reception*

Friday, May 25th

8:00am – 10:00am  
*Registration Open*  
*Foyer*

7:15am – 8:15am  
*Grandby*  
*Breakfast*

Concurrent Sessions:

8:30am – 10:10am  
*Virginia CPA Ethics: 2018 Required Course*  
*(Separate $65 Fee)*  
- Krista Edoff, Cherry Bekaert LLP

8:30am – 9:20am  
*Financial Policy Development*  
- Jenn Diercksen, Davenport & Company

9:30am – 10:20am  
*APA - Local Government Update*  
- Rachel Reamy and Kristy Scott, Auditor of Public Accounts

10:20am – 10:30am  
*Salons A, B, C*  
*Break*

10:30am – 12:15pm  
*Salons D, E*  
*Yes, You are a Fiduciary*  
- Beryl Ball, CAPTrust; Marc Purintun, Williams Mullen

12:15pm – 12:30pm  
*Foyer*  
*Boxed Lunches*
Join us at Future Conferences!

Spring Conferences

Hilton Norfolk The Main – May 8 – 10, 2019
Hilton Norfolk The Main – May 26 – 28, 2020

Fall Conferences

Hilton Richmond Hotel & Spa/Short Pump – October 24 – 26, 2018
Omni Richmond Hotel – October 9 – 11, 2019
Omni Richmond Hotel – October 14 – 16, 2020
VGFOA Executive Board 2017-2018

Officers

President – Diane Bergeron  
Director of Finance, City of Manassas  
Term Expires: Oct. 2018

Past President – Kathy Seay  
Deputy County Administrator, Hanover County  
Term Expires: Oct. 2018

President Elect – Curtis Doughtie  
Director of Finance, Virginia Resources Authority  
Term Expires: Oct. 2018

Treasurer – Janet Romanchyk  
Director, Loudoun County  
Term Expires: Oct. 2019

Board Members

Andrea Trent, Spring Conference Chair  
Manager of Retirement Plans, City of Roanoke  
Term Expires: Oct. 2019

Jill Underwood, Fall Conference Chair  
Financial Manager, Bedford Regional Water Authority  
Term Expires: Oct. 2018

Keli Reekes, Education Chair  
Director of Finance, Brunswick County  
Term Expires: Oct. 2019

Aaron McCoy, Associate Member Relations Chair  
Finance Officer, Virginia Beach Sheriff’s Office  
Term Expires: Oct. 2018

Trish Davidson, Education Chair  
Director of Finance, Rockingham County  
Term Expires: Oct. 2019

Stephanie Jones, Mentorship and Awards Chair  
Program Manager / Compliance Officer, Virginia Resources Authority  
Term Expires: Oct. 2019

Donna Witt, Communications, Legislative & Standards Setting Chair  
Director of Financial Services, City of Lynchburg  
Term Expires: Oct. 2020

Kenneth Folk, Executive Secretary  
Financial Services Manager, VML/VACo Finance

Virginia Government Finance Officers’ Association’s mission is “…to foster financial excellence in government by creating opportunities for professional development.”
<table>
<thead>
<tr>
<th>Date</th>
<th>President</th>
<th>City/County</th>
</tr>
</thead>
<tbody>
<tr>
<td>1971-1972</td>
<td>Hubert H. Shiner, Jr.</td>
<td>City of Petersburg</td>
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<tr>
<td>1974-1975</td>
<td>Giles G. Dodd</td>
<td>City of Virginia Beach</td>
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<tr>
<td>1975-1976</td>
<td>A. N. (Hoot) Gibson</td>
<td>City of Roanoke</td>
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<tr>
<td>1976-1977</td>
<td>Bill M. Perrero</td>
<td>City of Winchester</td>
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<tr>
<td>1977-1978</td>
<td>Aubrey D. Dodson</td>
<td>City of Danville</td>
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<tr>
<td>1978-1979</td>
<td>H. Jack Lissenden</td>
<td>Richmond</td>
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<tr>
<td>1979-1980</td>
<td>Roy W. Cherry</td>
<td>City of Portsmouth</td>
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<tr>
<td>1980-1981</td>
<td>Michael W. Hill</td>
<td>City of Lynchburg</td>
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<tr>
<td>1981-1982</td>
<td>Frank P. Turk</td>
<td>City of Salem</td>
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<tr>
<td>1982-1983</td>
<td>Ray B. Jones</td>
<td>Albemarle County</td>
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<td>1983-1984</td>
<td>Jimmy D. Clowers</td>
<td>City of Norfolk</td>
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<tr>
<td>1984-1985</td>
<td>John M. Chambliss</td>
<td>Roanoke</td>
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<tr>
<td>1985-1986</td>
<td>Dennis Kerns</td>
<td>Henrico County</td>
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<tr>
<td>1986-1987</td>
<td>Leon Hirsh</td>
<td>York County</td>
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<tr>
<td>1987-1988</td>
<td>Joseph N. Black</td>
<td>Hanover County</td>
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<tr>
<td>1988-1989</td>
<td>Joseph S. Paxton</td>
<td>Rockingham County</td>
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<tr>
<td>1989-1990</td>
<td>M. E. (Mickey) Poole</td>
<td>Loudoun County</td>
</tr>
<tr>
<td>1990-1991</td>
<td>John Mitchell</td>
<td>City of Colonial Heights</td>
</tr>
<tr>
<td>1991-1992</td>
<td>James Grisso</td>
<td>City of Roanoke</td>
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<tr>
<td>1992-1993</td>
<td>Jeffrey Lunsford</td>
<td>Montgomery County</td>
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<td>1993-1994</td>
<td>James McReynolds</td>
<td>York County</td>
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<tr>
<td>1994-1995</td>
<td>Raoul James Kister</td>
<td>Albemarle County Service Authority</td>
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<tr>
<td>1995-1996</td>
<td>Cecil R. Harris, Jr.</td>
<td>Hanover County</td>
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<tr>
<td>1996-1997</td>
<td>Mary C. Kemp</td>
<td>Town of Herndon</td>
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<tr>
<td>1997-1998</td>
<td>John Tuohy</td>
<td>Fauquier County</td>
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<tr>
<td>1998-1999</td>
<td>Clarence Daniel</td>
<td>Henrico County</td>
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<tr>
<td>Date</td>
<td>President</td>
<td>City/County</td>
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<tr>
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<td>-------------------</td>
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<tr>
<td>1999-2000</td>
<td>Jesse Hall</td>
<td>City of Roanoke</td>
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<td>2000-2001</td>
<td>Shelley Carmichael</td>
<td>Stafford County</td>
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<tr>
<td>2001-2002</td>
<td>Bill Johnson</td>
<td>City of Colonial Heights</td>
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<tr>
<td>2002-2003</td>
<td>Joseph Casey</td>
<td>Hanover County</td>
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<tr>
<td>2003-2004</td>
<td>Larry Clark</td>
<td>Richmond (Henrico County)</td>
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<tr>
<td>2004-2005</td>
<td>Phillip Grant</td>
<td>Town of Vienna</td>
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<tr>
<td>2005-2006</td>
<td>Terry S. Stone</td>
<td>Hanover County</td>
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<tr>
<td>2006-2007</td>
<td>Rebecca Owens</td>
<td>Roanoke County</td>
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<tr>
<td>2007-2008</td>
<td>Steven A. Solomon</td>
<td>Fairfax County Housing</td>
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<tr>
<td>2008-2009</td>
<td>Marycarol C. White</td>
<td>York County</td>
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<tr>
<td>2009-2010</td>
<td>Ann Shawver</td>
<td>City of Roanoke</td>
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<tr>
<td>2010-2011</td>
<td>Vivian McGettigan</td>
<td>Prince William County Public Schools</td>
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<tr>
<td>2011-2012</td>
<td>Patricia Weiler</td>
<td>City of Manassas</td>
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<td>2012-2013</td>
<td>Charles Ramsay</td>
<td>Henrico County</td>
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<tr>
<td>2013-2014</td>
<td>Barbara Dameron</td>
<td>City of Roanoke</td>
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<tr>
<td>2014-2015</td>
<td>Jon Munch</td>
<td>Fauquier County</td>
</tr>
<tr>
<td>2015-2016</td>
<td>Renee Hoover</td>
<td>Charlottesville City Schools</td>
</tr>
<tr>
<td>2016-2017</td>
<td>Kathy Seay</td>
<td>Hanover County</td>
</tr>
</tbody>
</table>
GFOA Certification Program

The Certified Public Finance Officers Program (Certification Program) of the Government Finance Officers Association of the United States and Canada (GFOA) is a broad educational self-study program designed to verify knowledge in the disciplines of government finance. The Certification Program is governed by the Council on Certification. Technical and administrative support for the program is provided by Radford University’s Governmental and Nonprofit Assistance Center.

Certified Public Finance Officers

<table>
<thead>
<tr>
<th>Name</th>
<th>Organization/Location</th>
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<tbody>
<tr>
<td>Lisa Anderson</td>
<td>City of Lynchburg</td>
</tr>
<tr>
<td>Lisa Breeden</td>
<td>Albemarle County</td>
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<tr>
<td>Jennifer Brody</td>
<td>City of Fredericksburg</td>
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<tr>
<td>Patsy Brown</td>
<td>Chesterfield County</td>
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<tr>
<td>Vivian Calkins-McGettigan</td>
<td>York County</td>
</tr>
<tr>
<td>Carrie Curry</td>
<td>Town of Leesburg</td>
</tr>
<tr>
<td>Patricia Davidson</td>
<td>Rockingham County</td>
</tr>
<tr>
<td>Deirdre Finneran</td>
<td>Fairfax County</td>
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<tr>
<td>Victoria Herrick</td>
<td>City of Williamsburg</td>
</tr>
<tr>
<td>Mark Highfield</td>
<td>James City County</td>
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<tr>
<td>Barbara Horlacher</td>
<td>Hanover County</td>
</tr>
<tr>
<td>Dennis Jarrett</td>
<td>York County School Division</td>
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<tr>
<td>Reid Lanham</td>
<td>City of Lynchburg</td>
</tr>
<tr>
<td>Sheila Minor</td>
<td>Minor and Associates, PLLC</td>
</tr>
<tr>
<td>Jonathan Munch</td>
<td>Fauquier County</td>
</tr>
<tr>
<td>Christopher Pietsch</td>
<td>Fairfax County</td>
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<tr>
<td>Ann Shawver</td>
<td>Ann Harrity Shawver, CPA, PLLC</td>
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<tr>
<td>Marta Smith</td>
<td>University of Mary Washington</td>
</tr>
<tr>
<td>Carol Swindell</td>
<td>Minor and Associates, PLLC</td>
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<tr>
<td>Gary Swink</td>
<td>City of Lexington</td>
</tr>
<tr>
<td>Tammy Todd</td>
<td>City of Salem</td>
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<tr>
<td>Lori Van Curen</td>
<td>Roanoke Higher Education Authority</td>
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<tr>
<td>John Wallingford</td>
<td>Prince William County Public Schools</td>
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<tr>
<td>Patricia Weiler</td>
<td>Powhatan County</td>
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<tr>
<td>Kendall Williams</td>
<td>Washington County</td>
</tr>
<tr>
<td>Regina Williams</td>
<td>Mountain Community Action Program</td>
</tr>
<tr>
<td>Donna Witt</td>
<td>City of Lynchburg</td>
</tr>
<tr>
<td>Susan Worrell</td>
<td>Albemarle County</td>
</tr>
</tbody>
</table>

May 23-25, 2018    Norfolk, Virginia
VGFOA and Radford University GNAC Certificate Program

The purpose of the VGFOA and Radford University GNAC Certificate Program is to:

- Provide training in the areas of accounting, budgeting, cash management, debt, administration, internal controls, Virginia law and other topics pertinent to state and local governments.

- Provide instructional support for those wishing to pursue the Government Finance Officers Association (GFOA) Certified Public Finance Officer (CPFO) certification.

VGFOA and Radford University GNAC Certificate Recipients

The following individuals have completed the requirements for the VGFOA and Radford University GNAC Certificate Program. Congratulations to our newest Certificate holders as of Spring 2018, designated in BOLD.

Mary Altemus, New Kent County
Jacqueline Althizer, Hanover County
Tina Ammons, King and Queen County
Ashley Anderson, Roanoke County
Lisa Anderson, City of Lynchburg
Dahlis Atkins, Isle of Wight County
Elizabeth Atkinson, Roanoke County
Margaret Bacon, Roanoke County
Katie Bailey, Stafford County
Pamela Barclay, City of Newport News
Judy Barnes, Stafford County
Monique Barnes, City of Hopewell Public Schools
Leslie Beasley, Hanover County
Mandy Belyea, Town of Woodstock
Natalie Berger, Prince William County
Diane Bergeron, City of Manassas
Christina Berta, Williamsburg-James City County Public Schools
Andrew Binks, James City County
Mary Blowe, City of Winchester
Tanya Burrell, Fairfax County
Christina Brannan, Central Virginia Community College
Lisa Breeden, Albemarle County
Celeste Broadstreet, City of Winchester
Jennifer Brody, City of Fredericksburg
Jay Brown, Charles City County
Tasha Burkett, City of Roanoke
Esther Caesar, Prince William County Government
Misty Caish, Virginia Beach City Public Schools
Elizabeth Carpenter, Williamsburg-James City County Public Schools
Brian Carter, Roanoke County
Tanya Catron, Roanoke County
Maria Cavin, Prince William County Schools
Nickie Champion, Gloucester County
Ju-Ling Cheng, Fairfax County
Lillian Cheng, Fairfax County
Carol Clancy, Fairfax County Housing
Lisa Cockrell, Loudoun County
Mary Collins, City of Lynchburg
Jeanne Colvin, City of Staunton
VGFOA and Radford University GNAC Certificate Recipients

Andrea Cooper, Gloucester County
Joseph Correa, Albemarle County
Michael Cosby, City of Roanoke
Karen Covert, Town of Vienna

Kathy Cox, Stafford County
Susan Crawford, Bedford County
Carrie Curry, Town of Leesburg
Sheila Cutrell, City of Emporia
Kathaleen Cyckowski, Fairfax County Water Authority
Patricia Davidson, Rockingham County
Lillie DeLancy, Virginia Lottery
Paul Deming, Portsmouth City Public Schools
Francis Deniega, City of Manassas

Gerard Durkin, City of Richmond
Teresa Eckhout, Central Virginia Waste Management Authority
Jami Engel, Prince George County
Rene Ewing, Williamsburg-James City County Public Schools
Jon Farmer, Virginia Resources Authority
Joseph Feaser, Virginia Housing Development Authority
Deirdre Finneran, Fairfax County
Paul Fitzgerald, Prince William County
Andre Fletcher, Warren County
Katrina Flowers, Virginia Department of Transportation
Amy Ford, Accomack County
Pamela Foster, Portsmouth Public Schools
Kathryn Fox, City of Salem
Rene Gapasin, Prince William County
Ruth Garcia, Loudoun County
Christine Garzynski, City of Norfolk
Keena Garns, City of Virginia Beach
Leesa Gayheart, Grayson County
Laurie Gearheart, Roanoke County

Cynthia Glascock, Town of Leesburg
Anand Goutam, Fairfax County

Patricia Green, Tazewell County
Stephan Greenagel, Town of Herndon
Lisa Greer, Roanoke County
Sue Gregory, Roanoke Higher Education Center
Tracy Gregory, City of Chesapeake
Vicki Hall, Fairfax County
Janet Haney, York County
Tealen Hansen, City of Suffolk
Dawn Hardman, Hanover County
Deanna Harris, Mathews County
Gail Hassmer, City of Charlottesville
Victoria Herrick, City of Williamsburg
Rebecca Hicks, Isle of Wight County Schools
Mark Highfield, Hanover County
Beth Hindle, City of Winchester
David Hockaday, Fairfax County
Renee Hoover, Charlottesville City Schools
Barbara Horlacher, Goochland County
Anne Howerton, Dinwiddie County
Wan Hu, City of Chesapeake
Barbara Hudson, City of Lynchburg
Sharon Hulehan, Virginia Beach City Public Schools
Helen Hutchings-Bogart, Prince William County
Stephanie Jackson, Halifax County

Tisha Jaudon, Albemarle County

David Jeavons, Roanoke Regional Airport Commission
Margaret Jefferson, New Kent County
William Jennings, Fairfax County Public Schools
Lori Jones, Town of Hamilton
Stephanie Jones, Virginia Resources Authority

Zainab Kamara, Arlington County
Pamela Kamlakkannan, Commonwealth of VA – DPOR
VGFOA and Radford University GNAC Certificate Recipients

Julie Kaylor, Matthews County
Tamara Keeseecker, City of Manassas
Teri Kent, Town of Herndon
Patricia Kephart, City of Virginia Beach

Alisa King, City of Waynesboro
Teresa Kirkdoffer, City of Charlottesville
Jana Kotalova, Arlington County
Rocio Lamb, Albemarle County
Reid Lanham, City of Lynchburg
Jody Lawson, City of Roanoke
Hansford Leake, Roanoke County
Eileen Leonard, Prince William County
Jian Lin, Albemarle County
Denise Lindquist, City of Manassas
Michael Longhi, Northern Virginia Transportation Authority

Rebecca Longnaker, Chesterfield County
Corrine Louden, Virginia Department of Corrections
Kimberly Ludwig, Hanover County
Zoe Lumpkin, City of Newport News
Regina Magalong, Fairfax County
James Mahone, Virginia Department of Treasury
Robin Mamola, City of Lynchburg
Arlene Matney, Tazewell County
Teresa May, Loudoun County
Aaron McCoy, Virginia Beach Sheriff’s Office
Vivian McGettigan, York County
Karen McMillan, Roanoke County
Sheila Minor, Minor and Associates, PLLC
Judy Morin, City of Newport News
Deborah Morris, York County
Dawn Mullins, City of Roanoke
Jon Munch, Fauquier County
Eileen Nguyen, Loudoun County
Ngan Nguyen, Fairfax County
Debbie Noble, City of Roanoke
Kimberly Oates, Fairfax County Water Authority
Tonya O’Connell, City of Newport News
Daniel Ogbon, Fairfax County Housing
Theresa Owens, City of Poquoson
Vicky Pannell, Albemarle County
Lisa Parker, City of Lynchburg
Amy Pearson, Virginia Workers’ Compensation Commission
Mark Pemberton, City of Lynchburg
Mary Penney, City of Salem
Jennifer Perkins, Dinwiddie County
Sally Perry, City of Manassas
Terrylyn Pete, Fauquier County
Susan Peterson, Roanoke County Schools
Lee Pfeiffer, Cumberland County
Meera Phaltankar, City of Portsmouth Schools
Diane Pham, Fairfax County
Mark Phelps, City of Portsmouth Schools
Heather Poulsen, James City County
Sabrina Quan, Loudoun County
Charles Ramsay, Henrico County
Susan Riley, City of Virginia Beach
Theresa Robey, Fairfax County Water Authority
Elizabeth Roe, Prince William County
Laura Rudy, Stafford County
Lynn Ruths, Loudoun County
Melissa Ryman, City of Falls Church
Andy Scales, Middle Peninsula Regional Security Center

Jerry Schulz, Town of Herndon
Marion Serfass, Town of Vienna
Philip Serra, City of Williamsburg
Ann Shawver, Ann Harrity Shawver, CPA, PLLC
Delores Smith, Wise County
Rhonda Sommer, City of Chesapeake
Cindy Speck, City of Lynchburg
VGFOA and Radford University GNAC Certificate Recipients

Kelly Spencer, Albemarle County Department of Social Services
Melody Sprague, Newport News Department of Human Services
Stuart Stallman, Fairfax County Housing
Marc Stein, City of Chesapeake
Randee Stenroos, Arlington County
Amy Stonebraker, New Kent County

**Gary Swink, City of Lexington**
Patricia Townsend, Prince William County Public Schools
Andrea Trent, City of Roanoke
Jill Underwood, Bedford Regional Water Authority

**Misty Upson, VDOT**
Lori VanCuren, Roanoke Higher Education Authority
Sharon Verry, Commonwealth of VA – DPOR
Krisanee Vitoonkittikul, City of Falls Church

**Kimberly Warren, Fairfax County Water Authority**
Patricia Weiler, Powhatan County
Jennifer Whetzel, Augusta County
Deborah White, Goochland County Public Schools
Marycarol White, Minor and Associates, PLLC

Brian Stump, City of Newport News Waterworks
Lora Swortzel, Augusta County
Sara Teyema, Arlington County
Tara Thomas, Gloucester County
Lisa Thorne-Izes, Prince William County Public Schools
Lindsey Thornton, Chesterfield County
Tammy Todd, City of Salem
Deborah Whitley, Fauquier Water and Sanitation Authority
Jennifer Wilkerson, Hanover County
Stacey Wilkes, Amherst County
Kendall Williams, Washington County
Regina Williams, Mountain Community Action Program
Catherine Wilson, Chesterfield County

**Consuela Wilson, Chesterfield County**
Nora Wilson, Mathews County Social Services
Donna Witt, City of Lynchburg
Tara Woodruff, James City County
Karen Woodson, City of Virginia Beach Public Schools
Miryam Woodson, City of Virginia Beach
Linda Woody, Town of Rocky Mount
Penny Xu, Fairfax County Public Schools
Wendy Zhi, Fairfax County
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Session Abstracts with Speaker Biographies

GFOA Update

The speaker will present a broad overview of GFOA’s activities and important new developments, including discussion of GFOA’s award programs, followed by an opportunity for Q&A.

Michele Mark Levine, Director
GFOA
MLevine@GFOA.org

Michele Mark Levine serves as the Director of the Government Finance Officers Association’s Technical Services Center. Prior to joining GFOA, Michele served as Deputy Comptroller for Accountancy and Chief Accountant of the City of New York, where she oversaw the City’s accounting and financial reporting, including the preparation of Comprehensive Annual Financial Reports which have consistently been awarded GFOA’s Certificate of Achievement for Excellence in Financial Reporting.

Levine was graduated Summa Cum Laude by the State University of New York at Binghamton, and holds a Master of Public Administration degree from the Maxwell School of Public Administration at Syracuse University. She was honored to have been named the 2011 Outstanding CPA in Government by the New York State Society of CPAs.
U.S. Economic Update

This session will provide an overview of the U.S. economy and assess where we currently are in the business cycle, including an outlook for GDP, Inflation and interest rates over the next couple of years. It will also provide a fairly in depth analysis of the Virginia economy, assessing both the overall health of the state’s economy and enormous range of economic prospects around the state.

Mark Vitner, Managing Director
Wells Fargo Financial Services
mark.vitner@wellsfargo.com

Mark Vitner is a managing director and senior economist at Wells Fargo, responsible for tracking U.S. and regional economic trends. Based in Charlotte, North Carolina, he also writes for the company’s Monthly Economic Outlook report and the Weekly Economic & Financial Commentary, and he provides regular updates on the housing markets, commercial real estate, regional economies, consumer spending, and issues impacting small business. He joined a Wells Fargo predecessor institution in 1993. Before that, he spent nine years as an economist for Barnett Banks in Jacksonville, Florida.

Vitner earned a B.B.A. in economics from the University of Georgia and an M.B.A. from the University of North Florida. He has completed further graduate work in economics at the University of Florida. He also completed the National Association for Business Economics (NABE) Advanced Training in Economics program at Carnegie Mellon University.
Virginia Economic Forecast

This presentation examines the performance of the Virginia economy since the Great Recession and the prospects for economic growth in 2018 and 2019. Particular attention is paid to the federal government and how spending decisions in Washington, DC affect the economy of Virginia.

Robert McNab, Professor
Old Dominion University
mcnab@odu.edu

Robert McNab currently serves as the Director of the Dragas Center for Economic Analysis and Policy in the Strome College of Business at Old Dominion University. He has published over 50 articles and chapters and is an Associate Editor with Journal of Economic Surveys and a board member of Public Finance and Management and Management and Organization Review. He has provided advice on issues of strategy, the allocation of public resources, and program evaluation in numerous countries. He has appeared in the Wall Street Journal, Washington Post, Richmond Times-Dispatch, Virginian Pilot, and Daily Press as well as television and radio in the Hampton Roads area. McNab joined the faculty of the Department of Economics in the Strome College of Business of Old Dominion University in July 2016 and previously was a member of the faculty of the Naval Postgraduate School in Monterey, California from 2000 to 2016.

McNab received his Bachelor of Arts from California State University, Stanislaus in 1991 and his Ph.D. in Economics in 2001 from Georgia State University in Atlanta, Georgia.
Speed Networking

Back by popular demand, this speed networking session offers conference attendees the opportunity to network with fellow finance professionals. The session will bring a handful of hot topics to be discussed at the roundtables. This session is being offered on the first day of the conference to maximize the networking throughout the conference. You won’t want to miss the opportunity to meet some new people and learn from what others are doing across the state.

Stephanie Jones, Senior Program Manager/Compliance Officer
Virginia Resources Authority
sjones@virginiaresources.org

Stephanie Jones is Senior Program Manager/ Compliance Officer at Virginia Resources Authority (VRA), the Commonwealth’s municipal bond bank. Since joining VRA in 2010, she now has primary responsibility for the oversight and ongoing review of all loans outstanding and reports quarterly to the Executive Director and Board on all matters relating to loan review and compliance. A member of Virginia Women in Public Finance, Jones was presented the organization’s prestigious Rising Star Award in 2014. In August 2015, she became an Executive Board member of the Virginia Government Finance Officers’ Association. She has earned the Virginia Government Finance Officers’ Certificate and the Virginia Local Government Management Association/ Virginia Tech Graduate Certificate in Local Government Management.

Jones received both her B.A. in Economics and her Master of Public Policy from William and Mary. While obtaining her MPP, she interned in the Williamsburg City Manager’s Office. She is also a graduate of the Commonwealth Management Institute.
Keynote Session - The Number One Thing That Holds Us Back

This workshop builds part of the foundation to the 10-80-10 Principle. If we acknowledge the way our personal bias forms our opinions and biases, we can easily be trapped by our own limiting beliefs. The goal of this session is to help move people from Impossible to Possible.

Sunjay Nath  
sunjay@sunjaynath.com

Sunjay Nath was a founding Vice President of an e-learning company based in Toronto that has gone on to become a multimillion-dollar company. Prior to that position he worked as an engineer for a distribution company in New York. He served as a camp director for several years with a camp that focuses on developing leadership skills in students. He has also held positions with H&R Block and Bank of Montreal. As a speaker, Nath has travelled extensively and addressed in person well over 1,000,000 people around the world since 1995. In 2005, he became the youngest Canadian (and third youngest in the world) ever to earn his CSP (Certified Speaking Professional).

Sunjay holds an undergraduate degree in Mathematical Engineering and a Master’s in Business Administration. During his MBA, he took first prize in an international business case competition.
GASB Update

This session will provide a general GASB update.

Paulina Haro, Project Manager  
GASB  
pharo@gasb.org

Paulina Haro is a supervising project manager with the Governmental Accounting Standards Board in Norwalk, Connecticut. Her current project assignments include Revenue and Expense Recognition, Electronic Financial Reporting, and information technology projects. She contributed to the development of Statements on Fair Value Measurement (72), Blending Requirements (80) and Irrevocable Split Interest Agreements (81). Before joining the GASB staff in 2014, she worked as Financial Analyst, Cash Manager and subsequently as Treasurer for the City of Fayetteville, North Carolina, and CIP Fiscal Manager for the City of Raleigh.

Haro received a Bachelor Degree in Business Administration—Accounting with Summa Cum Laude honors from Campbell University. She also holds a Master’s in Business Administration from the University of North Carolina, Chapel Hill, and is licensed as a Certified Public Accountant in the State of North Carolina.
The next set of Governmental Accounting Standards Board (GASB) requirements will be implemented soon. Join VRS to review them and learn about how we’re here to support you. Find out what resources are available to help Hybrid Retirement Plan members save more for retirement. Hybrid members now make up about 23 percent of the VRS population. As VRS moves toward online retirement next spring, you’ll see what role employers play in the new process. Get a preview of VRS’ newest resource, myVRS Financial Wellness, which helps members pursue financial goals using articles, videos, games, calculators, budgeting tools and customized action plans.

Barry Faison, Chief Financial Officer
Virginia Retirement System
BFAISON@VARETIRE.ORG

Barry Faison serves as Chief Financial Officer for the Virginia Retirement System (VRS), a $78 billion public employee retirement system. His division includes the departments of Finance, Budget and Performance Reporting, General Accounting, Employer Reporting and Investment Accounting. In addition, his division prepares and publishes the VRS Comprehensive Annual Financial Report (CAFR) and the VRS Popular Annual Financial Report (PAFR).

Faison holds a bachelor’s degree in accounting and a master’s degree in business from Virginia Commonwealth University. He is a Certified Public Accountant, a Chartered Global Management Accountant and a Certified Government Financial Manager. He currently serves as Chair of the Government Finance Officers Association’s Committee on Retirement and Benefit Administration.
Revenue and Expense Recognition

This session will provide a general update on the speaker’s current project in revenue and expense recognition.

Paulina Haro, Project Manager
GASB
pharo@gasb.org

Paulina Haro is a supervising project manager with the Governmental Accounting Standards Board in Norwalk, Connecticut. Her current project assignments include Revenue and Expense Recognition, Electronic Financial Reporting, and information technology projects. She contributed to the development of Statements on Fair Value Measurement (72), Blending Requirements (80) and Irrevocable Split Interest Agreements (81). Before joining the GASB staff in 2014, she worked as Financial Analyst, Cash Manager and subsequently as Treasurer for the City of Fayetteville, North Carolina, and CIP Fiscal Manager for the City of Raleigh.

Haro received a Bachelor Degree in Business Administration—Accounting with Summa Cum Laude honors from Campbell University. She also holds a Master’s in Business Administration from the University of North Carolina, Chapel Hill, and is licensed as a Certified Public Accountant in the State of North Carolina.
Cyber Security - Risk Management

The risk landscape is constantly changing with new threats, regulations, and evolving cybersecurity vulnerabilities and attack methods. To tackle increasing data threats, companies need to put cybersecurity at the very heart of the business. In this session, you will learn the key components of an effective cybersecurity risk management program. Remember, it's far better to start moving in a direction and learning as you go, rather than getting stuck in “analysis paralysis”!

*Cindy Gross*, Director  
Brown Edwards & Company, LLP  
cgross@BECPAS.com

Cindy Gross is an IT audit director based in the Harrisonburg office. She provides IT audit and consulting services to a wide range of entities including financial services, technology, and healthcare entities. Services include SOX compliance, SSAE 16/18 audits, SOC 2 audits, IT risk assessments, and IT internal audit.

A 2006 graduate of the University of Texas at Arlington, Gross has a Master of Professional Accountancy degree. In addition, she has a B.S. degree in Computer Programming and Information Systems from Shepherd University. She is a member of the American Institute of Certified Public Accountants and the Information Systems Audit and Control Association (ISACA) and is a Certified Information Systems Auditor through ISACA.
Cherry Bekaert's Annual Benchmarking Survey Results

During this session, the speaker will review and analyze the results highlighting the current state of governmental entities, including trend data, and with recommendations for how to successfully and efficiently move into the future.

Rob Churchman, Partner
Cherry Bekaert, LLP
rchurchman@cbh.com

Rob Churchman has over twenty-five years of experience serving state and local governments and not-for-profit entities providing clients with a full range of audit and accounting services, including Single Audits. He is a member of the American Institute of Certified Public Accountants, the Virginia Society of Certified Public Accountants, the National and Virginia chapters of the GFOA and the Association of Government Accountants. Throughout his career, Churchman has served these public sector organizations as a teacher and as a subject matter expert while also serving as a member of several related teams such as the AICPA Other Postemployment Benefits task force, the Commonwealth of Virginia's Auditor of Public Accounts' GASB #34 and #45 task forces and the VSCPA Government Issues Task Force.

Churchman received his Bachelors of Business Administration from James Madison University.
Innovation in the Public Sector

Government organizations, like their private sector counterparts, are seeking ways to incorporate innovative practices into their work. However, bureaucratic culture and fear of public failure often stifle innovation. How can finance leaders serve as innovation partners to drive transformation in how a government delivers better services for lower cost? How can finance organizations think about innovative, yet practical ways to drive business transformation before, during, and after a technology project? This session will explore the changing role of a finance organization – from a ‘behind the scenes’ function to an engine of innovation and a true business partner, with the right processes, polices, and systems to make that happen.

Matthew Burnham, Senior Manager
Accenture Management Consulting
matthew.g.burnham@accenture.com

Matthew Burnham is a senior manager in Accenture’s Health and Public Service business. He works with the cabinet and agency leadership at public sector organizations, including state, city, and county government agencies and non-profit organizations, on issues related to strategy, policy implementation, and organizational transformation. He is Accenture’s strategy and management consulting lead across Virginia and Washington, D.C. He graduated from the University of Virginia.

Rachel Westerfield, Communications Lead
Accenture Management Consulting
rachel.westerfield@dhhs.nc.gov

Rachel Westerfield is a leader aligned to Accenture’s Health and Public Service business. She joined Accenture seven years ago, and brings deep experience in project management for over ten years. During her career at Accenture, she has successfully led efforts for multiple statewide implementations on a large scale. Most recently, she has been helping lead a large transformational child welfare project impacting 100 counties in the state of North Carolina. She earned her PhD in Industrial/Organizational Psychology.
What Drives Health Care Cost and How to Contain It

As the economy continues to tighten and healthcare costs continue to rise, public sector employers are struggling with their employee value proposition. Historically, these employer’s value proposition was they may not have the highest salaries but provide comprehensive benefits. That value proposition may be eroding since the costs of benefits continue to escalate. We will provide employee benefit benchmarking data for public sector employers, so you can assess where your plan stands.

*Kerry Smith*, Senior Vice President and Sales Executive Manager  
USI Insurance Services  
kerry.smith@usi.com

Kerry Smith is a Senior Vice President with USI Insurance in Richmond, Virginia specializing in health and welfare consulting for mid to large size clients. Prior to joining Wells Fargo in 2006, she was in a producer role for one of the top international employee benefit consulting firms, working with many, publicly traded, Fortune 500 employers. She also worked as an Account Executive for Anthem Blue Cross and Blue Shield, maintaining and developing client relationships.

Smith received her Bachelor of Science degree in Psychology from St. Andrews College and attended graduate school at VCU.

*Nick Allen*, Consulting Actuary  
USI Insurance Services  
nick.allen@usi.com

Nick Allen is a Health Actuary and Senior Consultant in the Richmond office. He has consulted our private and municipal clients on their post-retirement health care liabilities and strategies, particularly in regards to FAS 106 and GASB 45 valuations. Prior to joining us, he worked as an actuarial consultant with Mercer Health & Benefits for seven years, and most recently worked with major health insurers for three years. He graduated from Virginia Tech with a B.S. in Mathematics, and is a Fellow of the Society of Actuaries.
Green Infrastructure Financing

Stormwater runoff is the only major source of nitrogen pollution still increasing in the Chesapeake Bay watershed. The Chesapeake Bay Foundation is working to introduce a new financial tool, Environmental Impact Bonds, to the watershed to help municipalities finance green infrastructure for stormwater management. CBF is working with impact investment advisory firm, Quantified Ventures, to pilot EIBs in up to 4 municipalities across Virginia, Pennsylvania and Maryland. Virginia Resources Authority and the Virginia Department of Environmental Quality also offer financial incentives within the Clean Water Revolving Loan Fund to address stormwater capital needs.

Gauri Gadgil, EIB Project Coordinator
Chesapeake Bay Foundation
ggadgil@cbf.org

Gauri Gadgil is the Environmental Impact Bonds project coordinator at the Chesapeake Bay Foundation. Her background is in sustainable urban development, and she previously worked at the World Bank where she supported the development of climate resilient infrastructure in flood-prone cities across Vietnam and Indonesia. She holds an M.A. from Johns Hopkins University and a B.A from Wellesley College.

Carolyn duPont, Director
Quantified Ventures
dupont@quantifiedventures.com

Carolyn duPont is a Director at Quantified Ventures, leading the firm’s environmental team. Prior to this role, she served on the investments team at Massachusetts Clean Energy Center, making early-stage debt and equity investments in clean energy and water companies. She holds an MBA from MIT Sloan School of Management, an MPA from the Harvard University Kennedy School of Government, and a BA in Anthropology from Stanford University.

Shawn Crumlish, Director of Financial Services
Virginia Resources Authority
dupont@quantifiedventures.com

Shawn Crumlish is Director of Financial Services at Virginia Resources Authority. In this role he has been involved in a number of land conservation and green infrastructure transactions including initial stormwater revenue bond issues for local governments. He holds an MS in Finance from Virginia Commonwealth and a BBA from James Madison University.
50 Shades of Fraud

An overview of the most common types of financial fraud, the schemes involved and the entities most targeted. Preventative and detection controls will be discussed along with other related areas to include but not be limited to the 5 key principals to managing fraud risk, offender types, limitations of external audits, the increasing role of internal auditors and other accounting and finance staff. Actual cases will be discussed, time permitting.

William Pounds, Manager
Cherry Bekaert LLP
rpounds@cbh.com

An experienced criminal investigator, auditor and corporate consultant for over 19 years, William Pounds is a Manager in Cherry Bekaert’s Fraud & Forensics practice. He specializes in consulting assistance to clients in numerous industries, with an emphasis on fraud investigation, public corruption, embezzlement, fraud prevention, mortgage fraud and financial crime enforcement operations. He is also a member of the Firm’s Fraud and Forensics group, assisting clients with forensic accounting, fraud examination services, fraud risk management, litigation support of financial crimes and defalcations and data analysis. Prior to joining Cherry Bekaert, he was a Special Agent within the Financial Crime Investigation Unit of the North Carolina State Bureau of Investigation.
William Dowd is Managing Principal of SageView Consulting Group. He has over 30 years of experience working with public and private corporations, public sector retirement systems, professional corporations, and associations. Dowd is a Fellow of the Conference of Consulting Actuaries, a member of the American Academy of Actuaries, and an Enrolled Actuary. He has a Bachelor of Arts Degree in Mathematics from the College of William & Mary.

Daniel Homan is a Principal and Consulting Actuary in the Houston, TX office of SageView Consulting Group. He is an Enrolled Actuary and a Member of the American Academy of Actuaries. He has over 30 years of experience working with qualified and non-qualified retirement and postretirement benefit plans for private sector, public sector, and multiemployer plan clients providing actuarial services, plan design consulting and merger and acquisition consulting. Homan is a graduate of Penn State University with a Bachelor of Science degree in Mathematics.
Investment Policy Development

Interest rates are rising! You have decided this is the year to establish an investment program or enhance your existing investment strategies. Where to begin? An Investment Policy is an essential component of any investment program that outlines how the program will be managed, including defining the organization’s objectives, describing permitted investments, establishing risk management procedures, and creating requirements for interacting with trading partners. During this session, we will discuss important considerations when developing or updating an Investment Policy for your organization's funds. We will address requirements and restrictions of the Code of Virginia, GFOA-recommended best practices, and guidelines for customizing an Investment Policy to meet your objectives.

*Kathleen Bowe*, Senior Managing Consultant
PFM Asset Management LLC
bowek@pfm.com

Kathleen Bowe joined PFM’s asset management business as an analyst in 2012. She works with cities, counties, utilities and other public and non-profit organizations to develop customized investment programs for operating funds, bond proceeds and defined benefit plans. Her responsibilities include performing portfolio structuring and analysis, reviewing portfolio performance, cash flow modeling, asset allocation analysis and updating investment policies. She serves on the Board of Directors for the Virginia chapter of Women in Public Finance, chairing the Communications and Outreach Committee and serving on the Education and Networking Committee. She is also a member of the Association of Public Finance Professionals for the District of Columbia, Maryland and Virginia. She was the 2016 recipient of the Rising Star Award presented by the Founders of the Virginia chapter of Women in Public Finance.

Bowe graduated from the University of Virginia with a B.A. in Economics. She holds FINRA Series 6 and 63 licenses.
Cooperative Contracts

No part of the Virginia Public Procurement Act has been amended more than the statutes written for cooperative procurement. From joint cooperatives to piggybacking, cooperative contracts have become a valuable tool in the public body's procurement tool box. This workshop gives some background on the use of cooperative contracts and discusses the advantages and disadvantages of cooperative procurement. All your users know is that cooperative contracts exists and want to rapidly use it. However, it’s up to public bodies to decide on whether the use of a cooperative is legal and appropriate. Leave this seminar with a better understanding on making the “right” decision.

Eugene Anderson, Professor
Norfolk State University
eanderson@nsu.edu

Eugene Anderson has been employed by the Commonwealth of Virginia for over 30 years. He currently serves as Director of Procurement Services at Norfolk State University. Previously, he served as the Director of Policy, Consulting and Review for the Department of General Services/Division of Purchases and Supply in Richmond, VA. He served as Secretary, Vice President and President of the Virginia Association of Governmental Purchasing.

Anderson graduated from Radford University with a B.S. in Business Management and a M.B.A.
Implementing the Green Book

This session will cover the updated Green Book (Government Accountability Office’s (GAO’s) Standards for Internal Control in the Federal Government) framework. It will discuss what internal control is as well as review the updated principles incorporated into the Green Book and how you can implement the framework within your organization.

Sean Walker, Principal
CliftonLarsonAllen, LLP
sean.walker@claconnect.com

Sean Walker is a Principal and Eastern Region State and Local Government Group Leader. He has been serving public sector clients since 1999. He is involved in the government industry on a national basis. He is a frequent speaker on government accounting, auditing, and single audits for professional associations around the country. He also serves as a consulting technical partner on CLA’s clients on government accounting and auditing, including OMB Uniform Guidance.

Walker received a Bachelor of Business Administration in Accounting from University of Wisconsin in Milwaukee, Wisconsin and a Master of Business Administration from Concordia University in Mequon, Wisconsin.
Rating Agency Panel

Fitch will present on Federal tax reform and the state budget and how all that impacts local governments. Moody’s will discuss VA medians and comparisons to national medians. S&P will review their new criteria for linked ratings.

Tim Barrett, Associate Director
S&P Global – Ratings
timothy.barrett@spglobal.com

Tim Barrett is an Associate Director in S&P Global Ratings’ Local Government Group in the U.S. Public Finance Department. He is currently the lead portfolio analyst for local governments in Maryland and Virginia, as well as the primary analyst for the District of Columbia. Barrett attended the University of Virginia in Charlottesville, VA for his undergraduate and graduate degrees. In 2005, he received his MBA from UVa.’s Darden School of Business.

Evan Hess, Associate Analyst
Moody’s Investors Service
evans.hess@moodys.com

Evan Hess is an Associate Lead Rating Analyst at Moody’s Investors Service, covering U.S. local governments in the Southeast. He is the lead analyst for local government ratings in Kentucky and a lead back-up for local government ratings in Virginia and South Carolina. Prior to joining Moody’s, He worked as a Commercial Banking Financial Analyst at Columbia Bank in Washington State. Hess holds a BA in Accounting from Western Washington University and is currently pursuing his MBA at New York University.

Parker Montgomery, Associate Director
Fitch Ratings
parker.montgomery@fitchratings.com

Parker Montgomery is an Associate Director in the U.S. Public Finance Department of Fitch Ratings located in New York City. He has nearly a decade of experience in the securities industry after beginning his career as an investment consultant and FINRA Series 7, 24 and 63 licensed broker providing securities analysis and transactions for clients including municipal investors. He received his Master of Public Administration with a focus in public finance from the University of Washington in Seattle where he also received a bachelor's degree in finance.
Virginia CPA Ethics: 2018 Required Course

Fulfill your annual, two-hour Virginia Board of Accountancy (VBOA) ethics requirement with a course that is trusted by more than 8,000 CPAs year after year. This course is based on the VBOA’s required outline for 2018.

Krista Edoff, Partner
Cherry Bekaert LLP
kedoff@cbh.com

Krista Edoff has more than fourteen years of experience providing audit and accounting services to public sector clients including financial and performance audits, agreed upon procedures, Single Audits and compliance audits. She is a member of the American Institute of Certified Public Accountants, the Virginia Society of Certified Public Accountants, the National and Virginia chapter of the Government Finance Officers Association, and the Affordance Housing Association of Certified Public Accountants. She is also a member of the AICPA’s Peer Review program, where her focus is governmental audits.

Edoff received her Bachelors of Science in Accounting and Masters of Accounting from Florida State University.
Effective financial policies play an important role in a local government’s fiscal health. This session will explore the various types of financial policies, their key components, as well as the process by which these policies are established. The session will also discuss the associated benefits that result from the adoption of such policies, including an overview of how they are viewed by the rating agencies and their potential impact on credit ratings.

Jenn Diercksen, Vice President
Davenport & Company
jdiercksen@investdavenport.com

Jennifer Diercksen is a First Vice President at Davenport & Company LLC, serving as financial advisor to state and local governments throughout the mid-Atlantic region. Through her role at Davenport, she helps to provide various financial services to clients, including credit rating analysis and preparation, strategic financial planning and debt management, as well as transactional-related services. Prior to joining Davenport in November 2016, Ms. Diercksen was an Associate Vice President in the Public Finance Department of Moody's Investors Service for six years, where she was responsible for rating various debt securities for local governments in the eastern region of the United States and acted as lead credit analyst for Delaware, Maryland, Pennsylvania, Virginia, and West Virginia.

Diercksen holds a B.A. in Economics from the University of Maryland – College Park and an M.P.A. from the Maxwell School at Syracuse University.
APA - Local Government Update

This session will provide miscellaneous updates related to comparative report, Audit Specification, UFRM, etc. and APA quality control reviews over Locality audits. It will also discuss APA Pension and OPEB updates impacting local governments.

Rachel Reamy, Audit Manager
Auditor of Public Accounts
rachel.reamy@apa.virginia.gov

Rachel Reamy is an audit manager with the Virginia Auditor of Public Accounts, and has been with the APA for over nine years. As the APA’s Local Government manager, she is responsible for compiling the annual Comparative Report of Local Government Revenues and Expenditures, along with other various responsibilities related to oversight and monitoring of Virginia’s local governments. Additionally, she performs other specialty tasks, to include acting as project manager for state agency audits, providing internal technical assistance related to audit and accounting standards, assisting in the APA’s strategic planning process, and developing and presenting internal trainings as well as external trainings for various local government focused groups. Reamy received her B. S. in Accounting and Criminal Justice from Old Dominion University, and her Masters of Accountancy from Liberty University.

Kristy Scott, Audit Supervisor
Auditor of Public Accounts
kristy.scott@apa.virginia.gov

Kristy Scott is an audit supervisor with the Virginia Auditor of Public Accounts (APA), and has been with the APA for over 5 years. She is responsible for serving in the role of auditor in-charge for state agency and university audits. She is currently serving as the in-charge for the Virginia Retirement System (VRS) audit. Additionally, she assists with the ongoing development of the APA’s strategic, risk-based models for establishing the frequency and scope of performance audits, creating and updating internal audit resources, and designing and presenting internal trainings. Scott received her Bachelor of Business Administration from Roanoke College and her Post-Baccalaureate Certificate in Accounting from Virginia Commonwealth University.
Yes, You are a Fiduciary

The regulatory and litigious environment for retirement plans is evolving. With increased complexity in all types of retirement plans, plan sponsors must meet fiduciary requirements while navigating an environment where retirement benefits matter more. This workshop will focus on the legal environment for Virginia public retirement plans, defining who is a fiduciary and what responsibilities come with the role. We’ll review the basic requirements for fiduciary processes, the key tasks necessary and, most importantly how to create retirement readiness for employees.

Beryl Ball, Senior Vice President, Financial Advisor
CAPTrust
Beryl.Ball@CAPTRUSTAdvisors.com

Following an extensive career as senior vice president for retirement services at SunTrust-Mid-Atlantic, Beryl Ball joined CAPTRUST’s Richmond office in 2008. While at SunTrust, she managed all retirement-related products and services for offices from Maryland to North Carolina, which represented over 700 401(k) and pension plans that totaled more than $11 billion in assets. Today, with CAPTRUST, she advises institutional retirement plan sponsors on areas such as fiduciary services, which includes independent advice on plan design, investment due diligence, fee-benchmarking, and investment education. She specializes in defined contribution retirement plans for profit and non-profit institutions.

Marc Purintun, Chair
Williams Mullen
mpurintun@williamsmullen.com

Marc Purintun is the chair of Williams Mullen’s Employee Benefits and Executive Compensation Practice. Marc regularly advises public and private clients with respect to the design, drafting and documentation of defined benefit plans, profit sharing plans, 401(k) plans, Section 403(b) tax-deferred annuity arrangements, long-term incentive plans, leveraged and non-leveraged ESOPs and Section 457 plans. He also regularly counsels clients on the design, documentation and on-going compliance of executive nonqualified deferred compensation arrangements (including compliance with the section 409A rules) and long-term incentive plans. He earned his Master of Laws in Taxation with a certificate in Employee Benefits at Georgetown University and his Juris Doctor at William and Mary Law School. He also earned a B.A. in History and Religious Studies from Macalester College.
As an industry leader with a premier trading platform, experience and geographic coverage, Bank of America Merrill Lynch helps municipal and conduit issuers raise debt capital, and also offer specialized tax advantaged services to institutional investor clients. With over 100 years of commitment to the public sector, our dedicated municipal finance professionals leverage the scope and strength of our enterprise to deliver superior results. For additional information, please see www.baml.com/munimarkets.

Cherry Bekaert LLP has provided high quality assurance services to some of the largest state and local government entities in the Southeast. The Firm has established a leading reputation for providing quality service and value-added advice through our work on numerous audit, compliance and advisory projects. Cherry Bekaert offers strategic financial and management solutions to help state and local government entities meet the evolving demands of today's public sector. The Firm's Government Services Group provides traditional audit and compliance services, as well as specialized services such as risk management services and performance audits.

CLA has 600 people who are dedicated to serving more than 1,700 local, county, and state government agencies. It has been a primary focus for more than 40 years. We understand the legislative changes, funding challenges, compliance responsibilities, and risk management duties that impact you. From offices coast to coast, our professionals deliver audit, tax, consulting, and outsourcing capabilities best aligned with our clients' needs. For more information, visit CLAconnect.com/Government/.
Davenport provides Financial Advisory and Underwriting services to public sector and not-for-profit issuers in the Mid-Atlantic region. In addition, our firm actively participates, through underwriting syndicates, in a wide variety of national issues. As financial advisor, Davenport handles the debt issuance process for the placement of tax-exempt and taxable municipal securities in both private placement and public offerings. As underwriter, we are able to serve as senior manager or co-manager in assisting our clients with all aspects of a financing transaction including structure, terms and conditions of the issue, market timing and distribution.

Empower Retirement is a leading retirement services provider for governmental deferred compensation plans, serving as the record keeper for state, city, county and other government municipalities. Empower also offers innovative saving and investment solutions designed to help people replace 100% of their working income in retirement — for life.

MAXIMUS is a national consulting firm that specializes in providing financial services to the public sector. Our dedicated professionals develop solutions that help governments track spending, manage funds more effectively, and better plan for the future. Through cost allocation plans, indirect cost rate calculations, user fees studies, and IT rate studies; we provide proven tools that have resulted in improved cost recoveries for hundreds of cities, counties, states and special districts.
Minor and Associates, PLLC provides a variety of financial and accounting consulting services to Virginia localities, authorities, and school divisions. Our services include year-end reporting and financial statement preparation, policy and procedure writing, bank and general ledger account reconciliations, interim Finance Director placements, budget preparation, and fixed asset, enterprise, debt, and other specialty accounting services. Clients from across the Commonwealth call Minor and Associates as a one-stop resource for local government financial matters.

OpenGov offers web-based software for state and local government finances. The OpenGov Platform provides instant access to the budget and visualizes current and historic revenue and expenses. Government officials and citizens use the platform to understand, analyze, and share the data. Learn more at http://opengov.com/.

Raymond James provides solutions to debt capital needs for public, private and not-for-profit companies and municipal entities. Consistently ranked among the top ten municipal bond underwriters in the nation, our team of veteran Public Finance bankers provides innovative solutions to often complex financing needs through a powerful distribution network and premier underwriting desk. Through mutual confidence and trust, deep knowledge, and extensive experience, we give our clients access to success.

Robinson, Farmer, Cox Associates is a leading provider of financial analysis and expertise to clients in many sectors. The Firm's services include Audit and Advisory, Tax and Commercial Accounting, and Management and Technology Consulting. Our clients include businesses, local governments, non-profit entities, associations, other organizations and individuals. We invite you to browse our information, and to contact us to find out how we can start helping you today.
RSM’s dedicated industry team helps public sector entities—including federal, state and local government units—across the country improve performance through a comprehensive understanding of their business models, internal processes, objectives and daily realities. RSM US LLP (formerly McGladrey LLP) is the leading provider of audit, tax and consulting services focused on the middle market, with more than 8,000 people in 80 offices nationwide. It is a licensed CPA firm and the U.S. member of RSM International, a global network of independent audit, tax and consulting firms. For more information, visit www.rsmus.com.

SunTrust Banks, Inc. is a purpose-driven company dedicated to Lighting the Way to Financial Well-Being for the people, businesses and communities it serves. Headquartered in Atlanta, the company has three business segments: Wholesale Banking, Consumer Banking and Private Wealth Management, and Mortgage. Its flagship subsidiary, SunTrust Bank, operates an extensive branch and ATM network throughout the high-growth Southeast and Mid-Atlantic states, along with 24-hour digital access. Certain business lines serve consumer, commercial, corporate and institutional clients nationally. As of December 31, 2015, SunTrust had total assets of $191 billion and total deposits of $150 billion. The company provides deposit, credit, trust, investment, mortgage, asset management, securities brokerage, and capital market services. SunTrust leads onUp, a national movement inspiring Americans to build financial confidence. Join the movement at onUp.com.

With more than 14,000 clients, Tyler Technologies is a leading provider of software and services for the public sector. Designed with an insider's understanding of the public sector market, Tyler Solutions improve the flow of information throughout an organization, empowering local/county governments, schools and other entities to better serve citizens.
U.S. Bancorp (NYSE: USB), with $364 billion in assets as of Dec. 31, 2013, is the parent company of U.S. Bank, the 5th largest commercial bank in the United States. The company operates 3,081 banking offices in 25 states and 4,906 ATMs and provides a comprehensive line of banking, brokerage, insurance, investment, mortgage, trust and payment service products to consumers, businesses and institutions. Visit U.S. Bancorp on the web at www.usbank.com.

VML/VACo Finance was established in 2003 to address many of the financial needs of Cities, Counties, Towns, School Divisions, and Authorities in the Commonwealth of Virginia. Through our pooled offerings and economies of scale, we provide superior financial services at lower cost. VML/VACo Finance offers three financing programs for capital projects and equipment; the Pooled OPEB Trust Fund; Virginia Investment Pool; and Accounting Services. Each program is designed to benefit governmental entities of every size and financial strength.

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804.402.5305  |  gregory.jordan@usbank.com
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