



MDGFOA has many ways to get involved with the organization, networking with your peers, additional education opportunities and more.

Intermediate Governmental Accounting Seminar

Taught 1-2 times per year

This 2 1/2-day seminar will provide the participant with a working knowledge of the special financial reporting model used by the state and local governments under Governmental Accounting Standards Board's Statement No. 34, Basic Financial Statements- and Management's Discussion and Analysis- for State and Local Governments.

Watch for the next Seminar promotion in your email

Debt and Fiscal Policy Affinity Group

To explore and discuss all aspects of governmental debt management

Chair: Steve Kraus, Mayor and City Council of Baltimore

Tax and Revenue Affinity Group

To create a group of tax collectors and others to discuss and analyze tax sale issues and procedures. To share views on modern technology for the collection of taxes and cash receipts. To create a friendly working atmosphere with collectors and the State Department of Assessments and Taxation. To gather pertinent information on legislative proposals and develop a consensus with elected officials.

Chair: Eric Jackson, Charles County Government

Speakers

Have you heard a great speaker lately!

MDGFOA is always on the lookout for new resources for Speakers and sessions.

Your ideas, experiences and recommendations are appreciated.

Co-Chair: Robert Sandlass, Harford County Government

Co-Chair: Mike Walther, Baltimore County Auditor's Office

Conferences

Attend our three one-day quarterly conferences locally at the BWI Marriott in Linthicum, MD

Finish off the MDGFOA Membership Year with our Annual Summer Conference in Ocean City, MD

Partnerships

Bringing your Corporate message and brand to over 800 Maryland Government Finance Officers has never been easier.

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Contact: MDGFOA@mdgfoa.org or visit our website

www.mdgfoa.org

mdgfoa@mdgfoa.org



2017 ANNUAL SUMMER CONFERENCE

June 21-23, 2016

Ocean City, Maryland



www.mdgfoa.org



Letter from the President

This last year it has been such a pleasure to be President of this great organization. Our Board and Committee members worked hard to provide educational opportunities, group discussions on pertinent topics, and access to subject matter experts to all our members.

This year our membership had the opportunity to earn 31 CPEs with:

interesting subjects such as Baltimore City's tax increment financing for Port Covington, and "So You Have Been Appointed to the Pension/OPEB Board- Now What?"; distinguished speakers such as Lt. Governor Boyd K. Rutherford, Dean Meade of the Governmental Accounting Standards Board, and Steve Kraus of Baltimore City; speakers from interesting organizations such as the Federal Reserve Bank and the World Bank; and the slate of topics our membership has come to expect: rating agency, general economic, and Federal and State budget and legislative updates.

The folks who make this possible are busy professionals in our field who take the time to make it happen for you. Many thanks to Past President Marty Jacobs, who offered guidance based on his years on the Board; Lenny Moore, our incoming President, for his good humor; Linda Watts, our Treasurer for doing *everything* it takes to keep the books; and Jason Zimmerman, our Secretary, for dotting all the i's and crossing all the t's in such a timely manner. My wish for you is that you have as much support in your term as President as I did from you!

Please join me in also thanking all the Board members, Standing Committee Chairs, Affinity Group leaders and especially the Program Committee co-chaired by Robbie Sandlass and Mike Walther for giving their commitment, time, ideas, and inspiration. MDGFOA is always looking for others who are interested in becoming involved. Contact a Board member to be that person.

Janet Irvin, President, MDGFOA

www.mdgfoa.org



Letter from the 2017-18 President



I am excited about being the Maryland Government Finance Officers Association (MDGFOA) 62nd President. For over 60 years the MDGFOA has been dedicated to the sound management of government financial resources. Our members have consistently maintained and advocated for the highest standards of our profession and, as a result, the State of Maryland and its political subdivisions have remained on the forefront of government financial management.

MDGFOA has supported you in those endeavors by providing best practice guidance in the areas of cash, debt, investment, and treasury (tax) management. We have consistently provided educational opportunities to ensure those officials responsible for financial reporting have the knowledge and guidance they need for their organization to achieve excellence in financial reporting. MDGFOA has also provided an environment for Maryland finance officers to network, leveraging the relative strengths, skills, and knowledge of each other.

While I am excited about this opportunity, I am also humbled by it. The challenges on government financial management are greater now than they have ever been. In this information age society, elected officials are expecting finance officers to develop ever more innovative ways to finance the programs of government and at the same time the public is demanding more accountability and transparency. Regulators, legislators, and standard-setting bodies have felt the pressure to take action to ensure desired outcomes. Consequently, Finance officers are operating in an increasingly complex regulatory, legal, and standard-setting environment. Therefore, I know as your President for the 2017-2018 term I must ensure that MDGFOA continues to provide the support you need to navigate this new world.

Years ago, I read a speech in a magazine called Vital Speeches of the Day on feminine leadership. The speaker indicated that feminine leadership is more collaborative in nature than masculine leadership. She stated that technology companies will especially benefit from a feminine leadership structure as the complexity of modern technology lends to companies partnering with each other to bring new products to market. I believe for finance officers to succeed in today's environment we must be more collaborative in nature. We must be able to leverage the relative strengths, skills, and knowledge of not only MDGFOA members but other similarly situated and dedicated associations. So, I am encouraged that my success for this term will not be so dependent on me or the individual efforts of Board members, but on your collective efforts to make the State of Maryland and its political subdivisions continue to practice sound management of government financial resources.

Lenny Moore, MDGFOA President 2017-18

Our Exhibitors

The 2017 MDGFOA Annual Summer Conference Exhibit Hall will open on Wednesday, June 21st at 1:00 p.m..

Thursday, June 22nd from 7:30 AM—4:00 PM

Friday, June 24th from 7:30 AM—12:00 Noon

See the latest management and finance-related new products and services from exhibitors for local and state governments. Use this time to get detail information, see demonstrations, touch base with current suppliers.



EXHIBITOR RAFFLE

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Tammy Nichols/ 410-547-4320
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2016-17 Lloyd W. Jones Scholarship

The Maryland GFOA Executive Committee at its regular meeting on May 2, 1997, approved the establishment of the Lloyd W. Jones Memorial Scholarship Fund.

Lloyd Jones was a past president of the Maryland GFOA and held vital City, County and State finance posts in addition to the many other organizations which he served as a volunteer. He was a most exemplary public servant in his positions as Director of the Maryland Deposit Insurance Fund, Director of the Department of Assessments and Taxation, Director of the Maryland Lottery, Chief Accountant for Baltimore City and Director of Finance of Carroll County. To honor Lloyd and the principles he stood for, Maryland GFOA annually awards a scholarship grant to a government employee to attend the MDGFOA Summer Conference who otherwise would not be eligible to attend at their employer's expense.

Congratulations

To our

2016-17 Scholarship Recipient

Dongmei Le, CPA, CPFO

Montgomery County Government– Financial Program Manager

Dongmei Li started with the County in 2011 as an Accountant II. When hired, she was working in the Controller's Div. on proprietary funds. As we were implementing a new system and process for retiree payroll, it became apparent that we needed an employee to gain indepth knowledge of the system and implement procedures to ensure accuracy. Dongmei became this person and transferred to the Retirement Dept. While in retirement, she was promoted 3 times to a management position. She has a CPA and CPFO. Once receiving her CPFO, she realized that her heart belongs in financial reporting and accounting and transferred back to the Controllers Div. in Jan 2017. She is responsible for the overall financial reporting for the County - including CAFR, State UFR, and other state mandated reports. She is also responsible for completing position papers on GASB Standards and implementing them at the County.

Friday, June 23

KEYNOTE

Craig Price, Price Points

As a speaker, author and podcaster, Craig has helped some of the most effective and diverse corporate leaders, from multibillion-dollar manufacturers to top universities, around the country find the path to success. His honest and realistic approach allows them to understand how to use negativity as a tool for change and productivity.

An award winning professional stand-up comedian and internationally exhibited nature photographer, Craig has a background in customer service, information technology and safety. Craig uses his sharp wit, intelligence and straight talk to deliver entertaining, informative programs that allow people to believe in themselves under any circumstances.

Peter Morici, Ph.D., Robert H. Smith School of Business

Professor Peter Morici is a recognized expert on economic policy and international economics. Prior to joining the university, he served as director of the Office of Economics at the U.S. International Trade Commission. He is the author of 18 books and monographs and has published widely in leading public policy and business journals including the Harvard Business Review and Foreign Policy.

Morici has lectured and offered executive programs at more than 100 institutions including Columbia University, the Harvard Business School and Oxford University. His views are frequently featured on CNN, CBS, BBC, FOX, ABC, CNBC, NPR, NPB and national broadcast networks around the world.

Information Desk Open

Terrace Level– Conference Center
7:00 a.m.—12:00 noon

Exhibit Hall Open

Lower Lobby Level
7:30 a.m.—12:00 noon

Breakfast Buffet

Horizons Restaurant
7:30 a.m.—8:30 a.m.

Keynote Address

Leading from All Sides: The Realist’s Guide to Leadership

General Session - Terrace Level Conference Center
9:00 a.m.—11:00 a.m.
2 CPE

Speaker: Craig Price, Price Points

With so many leadership styles out there, which one will work best for you? In a world of vastly different personalities and perspectives, finding ways to get all the pieces to fit into a cohesive and effective organization can be a challenge. If you want to be a good leader, good manager or a good employee, there is no one way. Often, the way you interact needs to change with each person and each situation. In this innovative, practical and entertaining program, discover realistic ways you can create a consistently successful leadership approach by adapting to differing personalities and creating the flexibility necessary to be a leader in today’s changing world. Attendees will learn how to

- Create productivity by embracing the talents of others
- Respond effectively to different personalities
- Merge opposing viewpoints into effective outcomes.
- Delegate Responsibly
- Adapt your leadership style to the individual

Break

11:00 am - 11:10 am
Exhibit Hall -Lower Lobby Level

Economic Update

General Session - Terrace Level Conference Center
11:10 a.m.—12:10 p.m.
1 CPE

Speaker: Peter Morici

This session will examine the state of the national and state economies and the prospects for continued economic growth. Forecasts for job creation, inflation, and other key economic indicators will be discussed.

12:15 pm - 1:15 pm
Adjourn
Luncheon—Horizons Restaurant

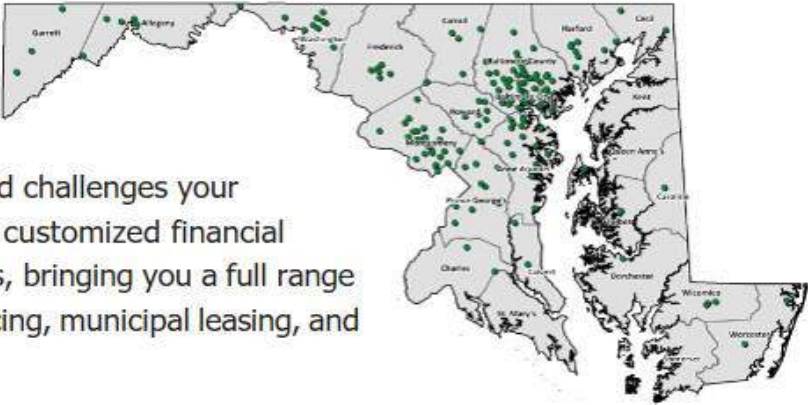
Adjourn



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Registration Hours

Attendee check-in and registration will take place on the Terrace level of the conference center

All attendees and their guests must check in to pick up their conference materials.

Wednesday, June 21

11:00 a.m. – 4:00 p.m.

Thursday, June 22

7:30 a.m. – 3:00 p.m.

Conference attendee badges:

All conference attendees must wear their name badges to be admitted to the conference sessions, breakfast, luncheons, networking sessions, Beach Bar-B-Que, Beach Bon Fire and the Exhibit Hall.

Guest badges:

Guests must be registered and wear their guest badges to be admitted to our breakfasts, luncheons, Beach Bar-B-Que, and the Beach Bon Fire.

Children under 16 must be accompanied by an adult at all times at the MDGFOA Conference functions.

Children are not allowed access into the Exhibit Hall.

Beach Bar-B-Que Tickets:

Beach Bar-B-Que tickets are available for purchase at the Registration Desk. You must present your ticket upon arrival if you are not a registered attendee or registered guest of the conference.

Device Charging Station:

We will have a charging station located in the Exhibit Hall for your use during the conference.

Please do not leave your device unattended. MDGFOA and the Clarion are not responsible for any lost or stolen items during the conference

Cellular Phones:



As a courtesy to our speakers and to the other conference attendees, please turn your cell phone on vibrate or off during conference sessions.

Dan Rempe, Moody’s

Daniel Rempe is an Associate Analyst for the New York Local Governments Ratings Team covering credits primarily in Florida, Georgia, North Carolina, South Carolina, and Virginia.

Prior to joining Moody’s, Daniel worked as a Senior Fiscal Analyst with the Community Development Block Grant Disaster Recovery Unit of the NYC Office of Management and Budget and as an English teacher in South Korea.

Daniel holds an MPA from NYU with a concentration in Finance and a BA in Political Science from the University of Albany’s Rockefeller College of Public Affairs.

Evette Caze, Director, Fitch Ratings

Evette is a Director in Fitch Ratings’ Public Finance Department. Evette’s area of focus consists of credit ratings for tax-supported credits in the Southeastern and Mid-Atlantic regions including Florida, Delaware, Maryland, Virginia, and North Carolina.

Prior to joining Fitch, Evette served as an Assistant Vice President at Financial Guaranty Insurance Company (FGIC) and Radian Asset Management, as an underwriter providing credit analysis of municipal issuers requesting bond insurance and as an analyst in risk management. Evette spent several years as a tax-supported ratings analyst at Moody’s Investors Service.

Evette received her B.A. in Finance from New York University and her M.S in Urban Policy at the New School.

Timothy Barrett
Associate Director, State and Local Governments
U.S. Public Finance

Tim is an Associate Director in Standard & Poor’s State and Local Government Group in the U.S. Public Finance Department. Tim has been with Standard & Poor’s since 2005, covering a variety of credits and security types in the east and west regions.

Tim is currently the primary portfolio analyst for local governments in Maryland and Virginia, as well as the primary analyst for the District of Columbia.

Tim grew up in Bethesda, MD and 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. Prior to Darden, Tim worked for Basile, Baumann, Prost, Cole & Associates, a real estate finance and development consulting firm based in Annapolis, Maryland.



Hibiscus Garden Deck

6:30 p.m.—8:00 p.m.

Inclement weather location: Terrace Level Ballroom

Snow Crab Legs

BBQ Beef Brisket

Maryland Fried Chicken

Pasta Salad

Southern Style Green Beans with Bacon

Redskin Potato Salad

Corn on the Cob

Cole Slaw

Watermelon

Lemonade, Iced Tea, Water, Miller Lite on Tap, Sodas, House Wine

You must have your badge or ticket to attend



Bank of America
Merrill Lynch



BEACH BONFIRE EVENT

Irish Coffee and Desserts with a SPARK!

Join us on the Lower Deck and Beachfront

8:00 p.m.—10:00 p.m.



Exhibit Hall:

Exhibits will be located on the Lower Lobby Level of the conference center. The Exhibit Hall is designed so you can view products, ask questions, and see live demonstrations of products and services that will save your government time and money.

Wednesday, June 21

1:00 p.m. – 5:00 p.m.

Thursday, June 22

7:30 a.m. – 4:00 p.m.

Friday, June 23

7:30 a.m. – 12:00 noon

Children are not permitted in the Exhibit Hall.

Exhibit Hall Raffle drawing:

Visit the MDGFOA Exhibit Hall located on the Lower Lobby Level of the conference center and get your Raffle Card Signed! Prizes are contributed by our exhibitors.

Winners Notice

Exhibitors will have their winners drawn by a designated MDGFOA member.

Winners will be posted on the board just outside the Conference Ballroom Friday Morning. You are responsible for picking up your prize from the exhibitor in the exhibit prior to noon.

Medical Assistance:

For extreme emergencies, please dial **911**

75th St. Medical Center

Open 8:00 am—12:00 am, 7 days a week

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No appointment necessary

MDGFOA does not promote or warrant the care from this facility. This is for information only



WIRELESS CONNECTION

Free Wi-Fi is available to all attendees in the Sessions and the Exhibit Hall.

NO PASSWORD NEEDED

Noise Levels:

We ask that participants not stand outside of our Session room during sessions for discussions. Seating is provided in the Exhibit Hall for all to network and discuss those all-important matters. Thank you.

Meals:

Meals will be open to all registered conference attendees, registered exhibitors and registered guests.

Badges are required for admittance to all food and beverage events.

Thursday, June 22

Breakfast Buffet	7:00 a.m.—8:15 a.m.	Horizons Restaurant
Family/Guest Picnic	12:30 p.m.—1:30 p.m.	Hibiscus Garden
Business Luncheon	12:45 p.m.—2:15 p.m.	Horizons Restaurant
Beach Bar-B-Que	6:30 p.m.—8:00 p.m.	Hibiscus Garden
Beach Bon Fire	8:00 p.m.—10:00 p.m.	BEACH!

Friday, June 23

Breakfast Buffet	7:30 a.m.—8:30 a.m.	Horizons Restaurant
Luncheon	12:15 p.m.—1:15 p.m.	Horizons Restaurant

Lost and Found:

If you have lost or found an item, please check in with the Registration Desk or at the Hotel Registration desk after conference hours.



REPORT OF THE NOMINATING COMMITTEE
June 2017

In accordance with Article VII, Election of Officers and Directors, of the Constitution and Bylaws of the Maryland Government Finance Officers Association, the nominating committee proposes the following slate of Officers and Directors for vote by the membership:

OFFICERS:

President-Elect	Linda Watts, Howard County
Treasurer	Jason Zimmerman, DHMH-Behavioral Health Admin.
Secretary	Robert Sandlass, Harford County Government

DIRECTORS:

Central Region- Ed Leiter, Carroll County Library

The following Officers and Directors are not on the ballot as they are holding current terms or in automatic advancement:

President- Elect becomes the President
Lenny Moore, Montgomery County Government

President becomes Past President
Janet Irvin, Maryland Environmental Service

Nominating Committee Chair: Martin G. Jacobs
The Nominating Committee Report is respectfully submitted.

Martin G. Jacobs
MDGFOA Past President

Family/Guest Picnic
12:30 p.m. - 1:30 p.m.
Hibiscus Garden

Business Luncheon
12:45 p.m.—2:15 p.m.
Horizons Restaurant



Hosted By:
M&T Bank



Supporting Small Businesses and the Local Economy

General Session - Terrace Level Conference Center
2:20 p.m.—3:10 p.m.
1 CPE

Presenters:

Bryan Brushmiller, Founder/Owner, Burley Oak Brewing Company

Gary Figgs, Seacrets Distillery

Eric Williams, Mispillion River Brewing

This roundtable will examine the growth of independent Maryland craft breweries, wineries, and distilleries and the economic impact they have on their local communities

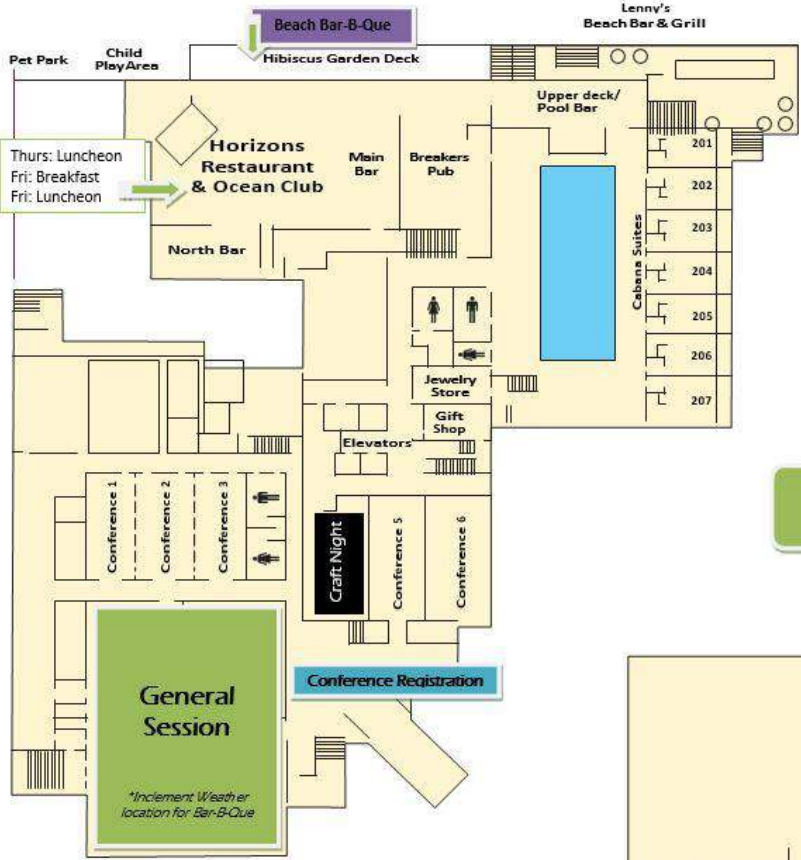
Business Meeting

General Session - Terrace Level Conference Center
3:10 p.m.—3:30 p.m.

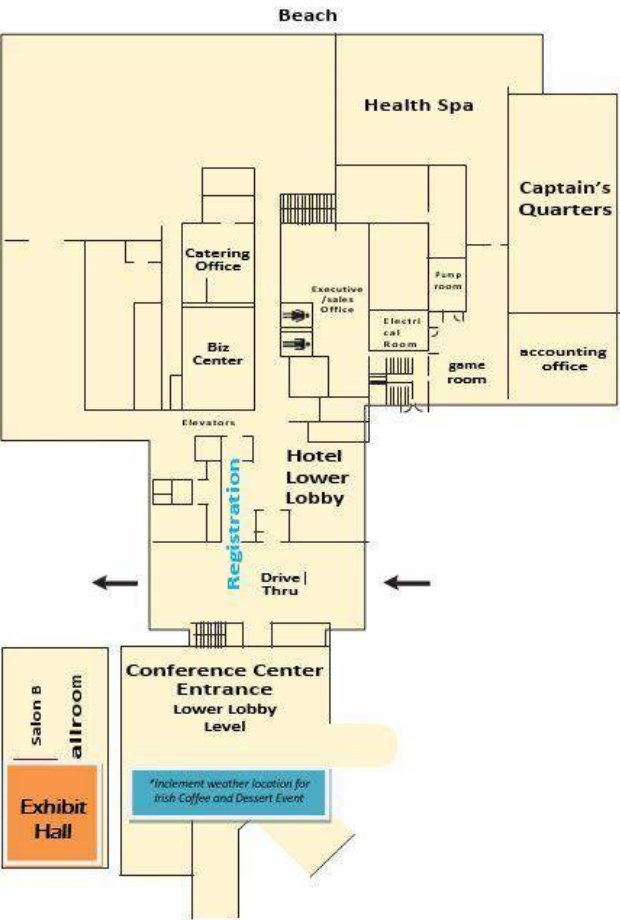
MDGFOA RAFFLE DRAWING!



Terrace-Level Map



Lower Lobby Map



Zelenkofske Axelrod LLC

Certified Public Accountants and Management Consultants

Harrisburg Office

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Corey Troutman, CPA, CGMA, Partner
Kimberly Stank, CPA, CGMA, Partner
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Greensburg, PA 15601
P: 724-834-2151 F: 724-834-5969

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**Management & MIS
Consulting**

**GASB Implementation
Services**

Cost Allocation Plans

Subrecipient Monitoring

Thursday, June 22

Bruce T. Miller

Finance Director; City of Annapolis

Mr. Miller has been employed in financial management since 1980; originally in the thrift industry, then in the municipal sector starting in 1993. Mr. Miller's responsibilities and positions in the thrift industry included; controller, treasurer, internal auditor, operations and included providing conservator and receivership management oversight services to insolvent Savings and Loan institutions. Prior to becoming Finance Director for Annapolis MD in November 2011, he served in like capacities for Nantucket, MA; Provincetown, MA; Plymouth, MA; and Providence, RI. Mr. Miller has experience in managing complex municipal organizations having multiple enterprise funds, utilities, agencies, authorities, and trusts, including pension, OPEB, and health trusts. As part of Mr. Miller's financial leadership, he has helped improve ratings and outlooks for the communities he has worked for and is a frequent speaker at pension investment and municipal finance forums and enjoys public service by sitting on boards of several not-for-profits and church organizations. Mr. Miller graduated with a B.S. in Accounting from the University of Baltimore.

Mary Claire Chessire

Mary Claire is a partner at the regional law firm of Whiteford, Taylor & Preston LLP, and is a resident in the firm's Baltimore office. She represents for-profit and not-for-profit businesses and local governments in all aspects of employee benefits issues. Clients range in size from sole proprietorships to multi-campus hospital systems. Mary Claire's practice includes advice and counsel on tax-qualified and non-qualified, retirement plans, executive compensation, health and welfare benefits, and other post-employment benefits. Services to clients include representation before the Internal Revenue Service and Department of Labor. In her 35 years working in the employee benefits industry, she has frequently counseled clients on fiduciary matters and is herself a fiduciary of three retirement plans. Mary Claire served on the Board of Trustees of Stevenson University from 2003 until 2015, including service on the Board's Executive and Compensation Committees.

Jennifer L. Diercksen

Jennifer L. 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. Ms. Diercksen also spent three years at Deloitte where she provided financial management services to multiple government agencies, and two years at the U.S. House of Representatives, Committee on Appropriations, where she audited various federal programs. Ms. 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.

Joseph D. Mason

As a Senior Vice President at Davenport & Co. LLC, Joe has a diverse public finance background, having served for the past 20 years as a state-level debt manager, a senior credit executive for Fitch Ratings, and a financial advisor to state and local governments throughout the mid-Atlantic region. Prior to joining Davenport, Mr. Mason was a Senior Director and head of Fitch Ratings' Public Finance - Eastern Region. Mr. Mason has spoken throughout the nation on rating matters and has authored numerous articles on municipal credit, public pensions, and OPEB. His work has been cited in several widely circulated publications, including The Economist, New York Times, Wall Street Journal, and The Bond Buyer. Mr. Mason obtained his B.A. in political science with a concentration in integrated liberal studies from the University of Wisconsin-Madison and an M.P.A. from The American University in Washington, D.C. He is an Associate Member of the Board of Directors of the Maryland Government Finance Officers Association. He is a Registered Municipal Advisor with Series 7, 50 and 63 licenses.

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**PUBLIC SECTOR FINANCIAL AND
MANAGEMENT ADVISORY SERVICES EXPERTS**

Fiduciary Training

“So You Have Been Appointed to the Pension/OPEB Board– Now What?”

General Session
Terrace Level– Conference Center
9:10 a.m.—10:50 a.m.
2 CPE

Presenters:

Gerry Goldberg, JD, CIMA, GYL Financial Synergies
David Boomershine, Boomershine Consulting
Bruce Miller, City of Annapolis
Mary Claire Chessire, Whiteford, Taylor & Preston LLP
Jennifer Dierksen, Davenport & Company LLC
Moderator: Joe Mason, Davenport & Company LLC

Join a panel of experts as they address several questions and areas of concern that retirement boards are facing today– much of it from recent experiences with the MACo OPEN Board, including the following perspectives:

- Board Member/Plan Sponsor
- Legal
- Actuarial
- Bond Rating Agency

Break

10:50 a.m. - 11:05 a.m.
Exhibit Hall -Lower Lobby Level

Rating Agency Update

General Session
Terrace Level– Conference Center
11:05 a.m.—12:45 p.m.
2 CPE

Presenters:

Dan Rempe, Moody’s
Evette Caze, Fitch Group
Tim Barrett, Standard and Poor’s

This session will feature a roundtable of representatives of the “Big Three” ratings agencies who will provide an update of the credit rating process and insight into key information their respective agencies are looking for.

Registration Open

Terrace Level– Conference Center
11:00 a.m.—4:00 p.m.

Exhibit Hall Open

Lower Lobby Level
1:00 p.m. - 5:00 p.m.

Office 365—What You Should Know

General Session - Terrace Level Conference Center
1:00 p.m.—2:40 p.m.
2 CPE

Presenter: John H. Higgins, CPA, CITP

Every organization that uses the traditional Microsoft Office applications: Excel, Outlook, Word, etc., is most likely going to end up with the Office 365 suite of applications. Office 365 is at the core of Microsoft’s business strategy to provide businesses with a hybrid solution of desktop and cloud based applications that provide a complete ecosystem for taking your business digital. This session will explain what Office 365 is, what the value proposition is and what you should know to determine if and how to deploy it in your organization. We will also do a lightning round review of many of the Office 365 applications so that you can see for yourself where they can be applied in your organization.

Break

2:40 p.m. - 3:00 p.m.
Exhibit Hall -Lower Lobby Level

3:00 pm - 4:40 pm

Take Excel to the Next Level with PowerPivot and Power BI

General Session - Terrace Level Conference Center
3:00 p.m.—4:40 p.m.
2 CPE

Presenter: John H. Higgins, CPA, CITP

Data analytics and visual dashboards two of the hottest trends for accounting and financial professionals. This session will show you how you can transform your use of Excel to perform more sophisticated data analysis using the new PowerPivot feature that is now part of Excel. Then we will review how you can present your analysis in a very visual format using the Microsoft Power BI cloud based reporting tool.

3:40 pm

Adjourn

Meals:

Meals are on your own today.

Wednesday, June 21



John Higgins, CPA, CITP

John serves as a strategic adviser to CPAs and the CPA profession in all aspects of leveraging technology. He has authored and presented CPE programs for thousands of CPAs over the past 25 years on technology and practice management issues. John is a pioneer in the development and delivery of web based CPE programs. He has presented “live” web CPE events for groups as large as 600+ participants, as well as many small groups. John assisted the Michigan Association of CPAs as an adviser in the development of their web based CPE model.

John’s primary qualification is his passion for helping CPAs achieve greater success by leveraging technology. He has extensive knowledge and experience working with CPAs throughout the country.



2017-18 Conference Schedule

Fall

October 27, 2017

Winter

January 19, 2018

Spring

April 27, 2018

Summer

June 20-22, 2018



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Sean Walker, CPA, CFE, CGFM, CGMS

Sean is a principal with CliftonLarsonAllen. He leads the firm’s Northeast region’s State and Local Government practice. He currently serves on ALGA’s Professional Issues Committee and GFOA’s Special Review Committee. Sean is a past member of the AICPA’s State and Local Government Expert Panel and the AICPA’s Governmental Audit Quality Center’s Executive Committee. He is a frequent speaker at AICPA and GFOA conferences on topics covering financial reporting, grant management, internal controls, and auditing. Sean lives in Frederick, Maryland and provides consulting and auditing services to clients throughout the United States.

Gerald B. Goldberg, JD, CIMA®

As CEO and Co-Founder of GYL Financial Synergies, Gerry provides consulting services to corporations, municipalities, self-insurance funds, non-profit organizations and high net worth private clients in areas that include investment policy, asset allocation and investment management selection and oversight. He also advises clients on the structure and development of qualified retirement plans. Gerry lectures and authors articles on various investment-related topics, and has served as an adjunct professor in the MBA Program at the University of Hartford.

Before co-founding GYL Financial Synergies in 2014, Gerry worked for Wells Fargo Advisors and its predecessor for 18 years. He was formerly one of 75 members of the Senior Consulting Council, Wells Fargo Advisor’s elite senior consulting group. Prior to Wells Fargo Advisors, Gerry practiced law for six years, most recently with the Boston firm, Bingham, Dana, LLP, and is currently a member of the bar in New York and Connecticut (not currently practicing).

From 2010–2016, Gerry was recognized six times by Barron’s as one of “The Top 1,200 Advisors” (formerly “The Top 1,000 Advisors”) in the nation.¹ He was also recognized by Financial Times as being among the “Top 400 U.S. Advisors of 2014”.²

Gerry obtained his JD from George Washington University and his BA in Political Science with a concentration in World Political Economics from the State University of New York at Binghamton. He holds the Certified Investment Management Analyst® certification, administered by Investment Management Consultants Association® and taught in conjunction with The Wharton School, University of Pennsylvania. Gerry is Series 65, 63, 24, 7, 3 registered and is insurance and variable annuity licensed.

David S. Boomershine; EA, MAAA, FCA, MSPA

As Senior Actuary and President of Boomershine Consulting Group, Dave has primary responsibilities for delivering actuarial consulting services and providing strategic retirement and health and welfare consulting solutions to clients.

Dave’s business background includes more than 35 years of experience with major national employee benefit consulting firms in senior positions. He founded Boomershine Consulting Group, LLC in 2007 and the Firm has grown consistently since then. Dave has spoken on a broad range of retirement topics in numerous forums including regional and national conferences and seminars. He has also been interviewed on radio numerous times concerning current public sector retirement plan issues.

He is an Enrolled Actuary (EA), a member of the American Academy of Actuaries (MAAA), a Fellow in the Conference of Consulting Actuaries (FCA) and a member of the American Society of Pension Professionals and Actuaries (MSPA). Dave earned a BA in Mathematics, with concentrations in Business Administration, Economics and Computer Science from Shippensburg University, PA.

MDGFOA 2016-17 Annual Partners

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OC ROCKET

RSVP to Ride the Rocket
Wednesday, June 21
Time: 11:30 a.m.

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All registered Attendees and their guests are invited.
Talbot Street Pier
311 Talbot Street on the Bay



Thursday
Business Luncheon

Join us for our Thursday Business
Luncheon hosted by:



June 22, 2016
1:15 PM

Horizons Restaurant
Clarion Resort Fontainebleau Hotel
(Conference Attendees only)

BEACH BONFIRE EVENT

Attendees are invited to attend the Bank of America Merrill Lynch Beach Bonfire event
following the Beach BBQ.



June 22, 2016
8:00 PM
Lower Deck and Beachfront
Clarion Resort Fontainebleau Hotel



Thursday, June 22

Registration Open
Terrace Level– Conference Center
7:00 a.m.—3:00 pm

Exhibit Hall Open
Lower Lobby Level
7:30 a.m.—4:00 p.m.

Breakfast Buffet
Horizons Restaurant
7:00 a.m.—8:15 a.m.

Welcome and Introductions
Janet Irvin, President, MDGFOA
General Session - Terrace Level Conference Center
8:00 a.m.—8:05 a.m.

Responding to Audit Findings
General Session - Terrace Level Conference Center
8:05 a.m.—8:55 a.m.
1 CPE

Presenter: Sean Walker, CPA, CFE, CGFM, CGMS, Principal, CliftonLarsonAllen LLP
This session will provide guidance and recommendations to assist you in responding to audit findings

Break
8:55 am - 9:10 am
Exhibit Hall -Lower Lobby Level