



SAVE THE DATES

MDGFOA Upcoming Quarterly Conferences

January 25, 2019

April 26, 2019

October 25, 2019

Annual Summer Conference In Ocean City

June 19-21, 2019

June 17-19, 2020

Visit our Exhibitors



MDGFOA AFFINITY GROUPS

Working as a team for success

Debt Group

The MDGFOA Debt Affinity Group is designed for Maryland government professionals that issue and manage debt. The focus of the Group includes the following subject matters: Policies and procedures for issuing debt and overall debt management. Provide innovative tools, techniques, and trends to assist members when issuing and managing debt programs. Discusses debt instruments, the relationships between internal and external parties. Remain current on changes to rating evaluation criteria and disclosure requirements. Offer updates on the changing regulatory landscape. Discuss other relevant debt and market subject matters as they occur.

Tax Collectors Group

The MDGFOA Tax Affinity Group is designed for Maryland government professionals that collect taxes. The focus of the Group includes the following subject matters: Discussion of State and Local laws that affect the collection and application of property taxes. Discussion of State and Local laws that deal with the application of property tax credits. Interaction with the State Department of Assessments of Taxation on property tax related matters. Discussion of technological methods that improve the efficiency of billing and collecting property taxes. Interaction with one of the Maryland Association of Counties (MaCo) representatives on subject matters before, during and after the State Legislative session that may have an impact on local jurisdictions. Roundtable discussion of property tax sale and mass payment servicing.

Young Professionals

The Young Professionals Affinity Group exists to foster and encourage the younger generation of our financial professionals, both students and currently employed fiscal professionals, by giving its members the necessary forums and tools to create the culture, knowledge, and opportunities to both enter a career in government finance as well as continue to succeed in their professional development.

Treasury Group

For more information
<https://mdgfoa.org/affinity-groups/>



Fall Conference

October 26, 2018

BWI Marriott

AGENDA

8:30 am Continental Breakfast / Registration

9:00 am - 9:10 am

Welcome and Introductions

Jason Zimmerman, President, MDGFOA

9:10 am - 10:00 am

Economic Update

Philip J. Fischer, Head of Fixed Income and Municipal Research
Bank of America Merrill Lynch

10:00 am - 10:50 am

Improving Cyber Security

Denise Hucke, Executive Director
Global Technology - Cybersecurity & Technology Controls
JPMorgan

10:50 am - 11:10am

Break

11:10 am - 12:00 noon

Is Your AAA Bond Rating "Worth It"?

Jennifer Diercksen, First VP, Davenport & Company LLC
Nisha Rajan, Analyst, Moody's
Carol Converso, Managing Dir., Lead Underwriter, M&T Bank

12:00 noon - 1:30 pm

Networking Session & Luncheon

1:30 pm - 2:20 pm

Maryland Revenue Update

Andrew M. Schaufele, Director
Bureau of Revenue Estimates

2:20 pm - 2:40 pm

Break

2:40 pm - 3:30 pm

School Reform Update

John R. Woolums, Esq.
Director of Governmental Relations, MABE

Kevin Kinnally, Policy Analyst, MACo

Kim Spivey, Director of Fiscal Services, IAC

3:30 pm - 4:30 pm

Finding, Developing and Keeping Top Talent – 3 Angles to a Common Challenge

Karl J. Ahlrichs, SHRM-SCP, SPHR

Thank you to our 2017-18 Partners

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Karl J. Ahlrichs, SPHR

Karl J. Ahlrichs, SHRM-SCP, SPHR is a Human Resources professional with more than 30 years of experience who trains organizations on ethics and risk management in general and Harassment Avoidance in particular.

He is a national presenter and author, a BLI Thought leader, and, as Senior Consultant at Gregory & Appel, has presented on complex HR topics to multiple industries. He has facilitated an invitation-only roundtable for CFOs for more than 20 years and has been named the SHRM Human Resource Professional of the Year for the State of Indiana.

Kevin Kinnally , Policy Analyst MACo

Kevin Kinnally serves as a Policy Analyst at the Maryland Association of Counties. Mr. Kinnally provides primary coverage for tax and fiscal policy, public education, elections, employee benefits and relations, emergency services, and intergovernmental relations. Kinnally co-hosts the Conduit Street Podcast and serves as the liaison to the Maryland Association of Budget and Finance Officers and Maryland Association of Election Officials. Before joining MACo in 2016, Kinnally served as a Senior Project Manager for a hospitality consulting firm.



The MDGFOA CPFO Review Courses are in the planning stages. Watch your email for an announcement of Review Courses and Dates.

Welcome to our New Members!

Opeyemi Afolayan, Edmund Anyanwu, Alicia Armorer, Deanna Ashenfelter, Veronica Atkinson, Jodi Baldwin, Marie Berg, Shon Bethea, James Blasic, Kimberly Boyd-Washington, Owen Clark, James Cooke, Tarsha Darden, LaTonya Davis, Julie Earp, Stephanie Ennels, Omar Fahnbulleh, Rachel Fitch, Andrew Galarza, Patricia Gossick, Alexandra Haag, Brittany Johnson, Monica Kearns, Mary Layman, Melissa Leaman, Anastasia Lisitskaya, Timothy Litz, Andrea Manna, Shannon Martin, Thelma McClellan, Jonathan Miller, Karen Monteith, Denitsa Myers, Peter Obalade, David Oyeshola, Nicholas Parker, Shahrzad Rizvi, Dereje Salehudres, John W. Simmons, Kelly Startzman, Stanley Tarway, Eizebel Trojillo, Leittia Vaughn, Jessica Wakefield, Tara Williams, Jessica Wilson, Nicole Wilson, Lan Xu, Sharon Yatsko, Xiaojing Zhang

Philip J. Fischer, Head of Fixed Income and Municipal Research Bank of America Merrill Lynch

Philip J. Fischer is a managing director and Head of Fixed Income and Municipal Bond Strategy at BofA Merrill Lynch Global Research. Under his leadership, the group produces credit and strategy products for global fixed income products with a focus on thematic relative value analysis. The publications provide policy, tax, and credit commentary. Fischer and his group work closely with other Fixed Income and Global Wealth Investment Management research professionals to analyze and position the fixed income asset class.

Fischer brings nearly 30 years of financial experience to his role. He has been recognized by both Smith's Research and the Institutional Investor as an all-star. He is the author of "Investing in Municipal Bonds" (McGraw-Hill, January 2013) and numerous other pieces on the municipal market. He has also been a director of Banc America Preferred Funding Corp. Previously he has also worked at Salomon Brothers and Citicorp Investment Bank. Fischer taught at the University of Oregon (finance and business law) and SUNY Albany (finance, investments and economics). Fischer holds a BSChE from Oregon State University, a J.D. from Loyola School of Law and an M.B.A. (finance) and Ph.D. (finance) from the University of Oregon.

Denise Hucke, Executive Director - Global Technology Cybersecurity & Technology Controls

Denise Hucke has been working in Technology for 20+ years and working in cybersecurity and controls for over 15 years. She currently works as a Technology Control Officer (TCO) overseeing the Risk & Controls aligned to Commercial Bank. Prior to this role, she was the Business Information Security Officer (BISO) and Head of the Technology Controls for Corporate Technology (CT).

Previously, Denise was the global CISO at ADP. As ADP's Chief Information Security Officer (CISO), Denise was responsible for building the team in the three global Incident Management Centers (CIRC and Fraud Monitoring) in NJ, India and the Philippines. This group included Security Engineering and Operations, Vulnerability Management and Security Testing and Analysis Teams. The Global Security Organization were recognized by ISE as the North America Project Award Winner and by Netwitness for the Best SOC. The Trusted Platform Security Initiative (TPSI) was also recognized by CSO40. Denise held several roles at ADP, including the Chief Business Security Officer (CBSO) for US & Canada, where she was accountable to provide security services for US & Canada Division Presidents. Denise also led the Operational Risk Program, which included Controls Assurance, Mergers and Acquisitions and Policies.

Denise worked at Merck for 16 years, where she held several roles overseeing the worldwide security programs for GRC, Risk Management, Compliance, Incident Response, Engineering/Operations, Vulnerability Management, Corporate Policy, the Security Education and Awareness Program. In 2009, she was appointed by the Executive Committee to represent cybersecurity during the \$41 billion merger of Merck and Schering-Plough pharmaceuticals.

Denise is active in multiple industry consortiums and is on the Board of Advisors for the Executive Women's Forum. She has been a speaker at RSA, the EWF's national conference, ISSA, Cloud Security Alliance, ICS2, ASIS, WITI and ISE. Denise holds a Masters in Telecommunication Management from Stevens Institute of Technology, Bachelor of Science in Economics from Rutgers University. Denise holds several industry certifications, include CISSP, GIAC and ITIL. Her mission and dedication span globally and has been recognized with several leadership and achievement awards.

**Jennifer L. Diercksen, First Vice President
Davenport & Company LLC**

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.

**Nisha Rajan, Analyst
Moody's**

Nisha Rajan is an Analyst on the New York Local Governments Ratings Team, serving as the lead analyst covering credits in Maryland, and the backup analyst for credits in Florida, Kentucky, and Georgia. Nisha has authored a variety of research about economic and fiscal trends affecting local governments across the nation, particularly in Florida. Prior to joining Moody's in 2015, Nisha worked for Societe Generale in Paris, Sandia National Laboratories, and Teach For America.

Nisha holds a BA in Economics from the University of New Mexico and an MSc in Finance from Institut d'études politiques de Paris (Sciences Po Paris).

**Carol Converso, Managing Director- Lead Underwriter
M&T Bank**

Ms. Converso joined M&T Securities in July 2008. Prior to joining MTS she worked eight years at Ferris, Baker Watts, Inc. ("FBW") where she served as that firm's lead underwriter for negotiated and competitive bond issues. Ms. Converso has worked in the Municipal Capital Markets business since 1983, including 2 years at Alex, Brown and 13 years at Legg Mason, where she was Municipal Syndicate Manager. At FBW, Ms. Converso was responsible for structuring, pricing and managing all new municipal bond issues. She also worked on marketing and analyzing new municipal issue credits for FBW's sales force and clients, as well as presenting firm credentials to potential clients such as state and local government agencies, development authorities, private developers, hospitals, educational institutions and continuing care retirement community board members.

Ms. Converso holds a finance degree from the University of Baltimore. She is a Member of the Municipal Regional Underwriters' Committee and a Past President of the Municipal Bond Club of Baltimore.

**Andrew Schaufele, Director, Bureau of Revenue Estimates
MD Comptroller's Office**

Mr. Schaufele is the Director of the Bureau of Revenue Estimates. He previously served as the Assistant Director. Before joining the Comptroller's Office, Andy spent seven years in various private sector management positions, working in both consumer and commercial oriented product lines. Andy holds a bachelor's degree from Towson University, where he studied management and economics, and a Master's degree in Business Administration from the joint University of Baltimore and Towson University program.

**John R. Woolums, Esq., Director of Governmental Relations
Maryland Association of Boards of Education**

John R. Woolums, Esq. is the Director of Governmental Relations with the Maryland Association of Boards of Education (MABE). Mr. Woolums has been responsible for conducting the Association's state and federal lobbying activities on behalf of Maryland's twenty-four local boards of education since 2001. He is a 1995 graduate of the University of Maryland School of Law and is a member of the Maryland Bar. Since 2006, he has coauthored and coedited the Maryland School Law Deskbook. Mr. Woolums is a 1987 graduate of Miami University in Oxford, Ohio. Upon graduation he worked for five years as a legislative aide to U.S. Senator Barbara Mikulski. Following graduation from law school, he worked with a Washington, DC law firm; and as committee counsel to the Maryland House of Delegates Environmental Matters Committee in 1997. Prior to joining MABE, Mr. Woolums was the associate director of the Maryland Association of Counties from 1998 to 2001.

Kim Spivey, Director of Fiscal Services, IAC

Ms. Spivey joined the Interagency Commission on School Construction (IAC) in December 1991, and has served in a variety of fiscal roles. She started as the Fiscal Administrator overseeing grant payments and the operating budget, then became Program Manager for the Capital Improvement Program, the Aging Schools Program, the Qualified Zone Academy Bond Program and other funding initiatives exceeding \$300 million annually. She currently serves as the Director of Fiscal Services, administering the agency's operating and capital budgets.

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