



SAVE THE DATES

MDGFOA Upcoming Quarterly Conferences

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/>



Winter Conference

January 25, 2019

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 - 10:50 am

GASB Update

Dean Mead, Senior Research Manager,
Governmental Accounting Standards Board (GASB)

10:50 am - 11:10am

Break

11:10 am - 12:00 noon

Cyber Insurance and Responding to Cyber Attacks

Jay Wiley, Administrative Vice President and Director of Cybersecurity Operations

M&T Bank

John R. Lawrence, Vice President- Commercial Insurance Division

M&T Bank

12:00 noon - 1:30 pm

Networking Session & Luncheon

1:30 pm - 2:20 pm

Arbitrage and Post-Issuance Compliance

Kim Hoyt, President

Bingham Arbitrage Rebate Services

2:20 pm - 2:40 pm

Break

2:40 pm - 3:30 pm

Federal and State Legislative Update

Emily Brock, Director,

Federal Liaison Center, GFOA

Michael Sanderson, Executive Director
Maryland Association of Counties (MACo)

3:30 pm - 4:30 pm

Budget Transparency and Community Involvement

Caroline Sturgis, Deputy Budget Director

City of Baltimore



Thank you to our 2018-19 Partners

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**Caroline Sturgis, Deputy Budget Director
City of Baltimore**

Caroline Sturgis is currently serving as the Deputy Budget Director for the City of Baltimore, Maryland, where she leads a team responsible for the planning, development, and monitoring of the City's \$2.8 billion operating budget. Caroline has more than 20 years in local government and financial management experience. She has worked with the City of Baltimore since 2004 in various positions including real estate officer, budget management analyst, assistant director for property acquisition and relocation, fiscal services director, and chief financial officer for Baltimore Police Department. Prior to relocating to Maryland, Caroline worked as a financial operations manager for the Broward County Clerk of Courts in Fort Lauderdale, Florida. She earned her Master's in Business Administration from Nova Southeastern University and her Bachelors in Psychology from the University of South Florida.



**Dean Mead, Senior Research Manager
Governmental Accounting Standards Board (GASB)**

Dean Mead is the Senior Research Manager at the Governmental Accounting Standards Board. Dean is lead methodologist for the GASB, responsible for overseeing project managers in the planning, design, and administration of the GASB's research agenda, managing external research, and interfacing with the academic community. Dean also coordinates the GASB's constituent outreach and communication efforts and is staff liaison to the Governmental Accounting Standards Advisory Council. Dean is a lecturer at Rutgers Business School, Rutgers University. Prior to joining the GASB, Dean was the Deputy Research Director at the Citizens Budget Commission in New York City. At that time, he was an adjunct member of the finance faculty at the Robert F. Wagner Graduate School of Public Service, New York University, where he pursued his doctoral studies in public finance, public policy, and management. He holds an undergraduate degree in public policy from Cornell University.



You will get an extra discount on your room reservation at the Clarion for the MDGFOA Annual Summer Conference if you book by March 1st?

You can access your CPE Certificates online by logging into your MDGFOA account?

That MDGFOA will be hosting another CPFO Review Course in the Spring? (*watch for the email announcement*)

That you can be a part of the MDGFOA 'team' by volunteering to be on one of the committees?

If you would like more information please feel free to visit our website or contact us via email at MDGFOA@mdgfoa.org



**Jay Wiley, Administrative Vice President and Director of
Cybersecurity Operations
M&T Bank**

Jeffrey J. (Jay) Wiley, Administrative Vice President and Director of Cybersecurity Operations, directs and oversees 24x7 operations to identify, protect, detect, respond to and recover from, information security-related incidents affecting bank assets and infrastructure at M&T Bank. Jay has more than 30 years of government, military, and business experience developing and implementing policy to support technical cybersecurity operations, cutting-edge research and development, systems and systems security engineering, certification and accreditation, strategic and disaster planning, Signals Intelligence, Imagery Intelligence and information technology at multiple classification levels. Prior to this, Jay joined M&T Bank from the Internal Revenue Service (IRS) where he served as the Senior Advisor to the Associate Chief Information Officer (ACIO) for Cybersecurity. In this capacity, Jay provided high-level technical analysis and expertise in designing, developing, and delivering a comprehensive Cybersecurity program for the IRS in accordance with Federal statutory, legislative, and regulatory requirements. Prior to joining the IRS, Jay was a senior security engineer at Raytheon, in Garland, Texas and prior to that served over 20 years as a Military Intelligence Officer in the U.S. Army. He had multiple national-level intelligence assignments, in the U.S. and overseas, as well as leading organizations from small to large (450). Jay holds a Bachelor of Science Degree from Park University and Master of Science Degrees from Bowie State University and Southern Methodist University. **AFFILIATIONS** He is a Certified Information Systems Security Professional - Information Systems Security Engineering Professional (CISSP-ISSEP), and a Microsoft Certified Systems Engineer (MCSE).



**John R. Lawrence, Vice President-Commercial Insurance Division
M&T Bank**

John R. Lawrence is a Vice President in the Commercial Insurance Division of M&T Insurance Agency. John was hired out of college into M&T Bank's Management Development Program. The program, founded by former CEO Bob Wilmer's, hires young professionals each year and educates them on all areas within the M&T Bank organization. After completing a year of training in Buffalo and Baltimore, John accepted a position with the M&T Insurance Agency in Syracuse, NY. John spent four years in Syracuse, where he spent time in account management, claim management, risk management and account production. While in Syracuse, John earned his Accredited Advisor in Insurance (AAI) designation, completing the course with perfect marks. John was promoted twice during his tenure in Syracuse, first in 2011 to an officer position and then to an Assistant Vice President in 2013. In 2014 John transferred down to the Mid-Atlantic region to continue his role as an account executive. In 2017 John was promoted again to his current role as Vice President. John's primary focus is on middle market accounts in the following areas; financial services, real estate, healthcare, and manufacturing. John is a Hamilton College graduate, where he earned his bachelor's degree in Economics.



**Kim Hoyt, President
Bingham Arbitrage Rebate Services**

As President of Bingham, with an extensive background as an accountant and analyst in the banking industry, Kim provides the dynamic leadership and sound management necessary to produce high quality, consistent arbitrage rebate services. Working exclusively in rebate computation for more than twenty-seven years, Kim's expertise focuses on close scrutiny of the complex details associated with arbitrage rebate, ensuring regulatory compliance and precision reporting for every client. Kim has effectively guided Bingham's Account Managers and staff through the post-issuance compliance changes that have resulted from the evolution in U.S. Treasury Regulations.

Informing and Educating on Post Issuance Compliance: Ms. Hoyt is a recognized professional in the arbitrage compliance field. Ms. Hoyt conducts specialized training and seminars for clients and the public finance industry on post-issuance compliance topics such as bond yield, arbitrage rebate calculations, yield reduction, and recordkeeping. Ms. Hoyt has also presented sessions with representatives from the Tax-Exempt Bond (TEB) compliance group within the Internal Revenue Service.



**Emily Brock, Director, Federal Liaison Center
GFOA of the US and Canada**

As Director of GFOA's Federal Liaison Center, Emily leads coalition and advocacy efforts of the Public Finance Network in Washington DC. Her advocacy includes anticipating and responding to federal legislative and regulatory activities that impact the finance functions of state and local governments and public sector entities including general sales tax issues, bank-qualified debt and pension/healthcare reform. Emily also serves as staff on GFOA's Debt Committee, working with committee members to develop best practices that promote sound financial practices for local, state and provincial governments. Prior to joining GFOA, Emily was a commercial bank relationship manager at a large national bank, serving as the sole bank liaison for government and university clients.



**Michael Sanderson, Executive Director
Maryland Association of Counties (MACO)**

Michael Sanderson is the Executive Director of MACo, the Maryland Association of Counties. MACo represents county governments on policy and fiscal issues in Annapolis, and serves the county elected officials across the state. Michael has been with MACo for 24 years, and just hit the ten year mark as the Director. Michael also co-hosts the Conduit Street Podcast, which covers state policy and politics across Maryland. He's got a long history with state and local fiscal issues, and is pleased to be a frequent MDGFOA presenter.

**When, Where and How to accomplish accessible education
and receive credits that fit your schedule**



- Cash Management and Banking– 8 CPE's
 - Debt Management– 10 CPE's
- Intermediate Governmental Accounting– 7 CPE's
- Internal Controls, Auditing and Fraud– 7 CPE's
 - Introduction to Governmental Accounting
- Retirement and Benefits, Risk Management, and Procurement– 10 CPE's

<https://mdgfoa.org/resources-2/e-learning-courses/>