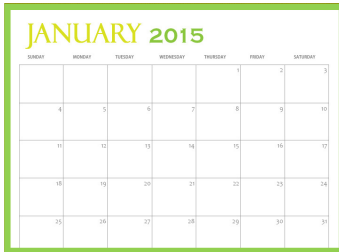


AGA Phoenix Chapter (www.agaphoenix.org)

PY 2014-2015

January 2015



Message From the President

We will host two AGA national web conferences in January. On the 14th, panelists on the web conference will discuss the value of using data analytics to address issues such as improper payments and fraud. On the 28th, *Strengthen Grants Management* will review the major restructuring of grants management, its significance to state and local governments, and other efforts to improve oversight of federal grants.



In addition to the web conferences, we will host *Professional Ethics Update for Arizona CPAs* on January 23rd. This course is designed to meet the Arizona biennial four-hour ethics CPE requirement for CPAs renewing their licenses.

More information on our events is on the website.

If you have any comments or suggestions, please email me at aga@agaphoenix.org.

Thank you for supporting the Phoenix chapter.

Joshua Consier
President
AGA Phoenix Chapter



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January Meetings:

1) Date: January 14, 2015

Time: Lunch: 11:30 AM—12:00 PM, Meeting: 12:00—1:50 PM

Topic: Auditing / Internal Controls

CPE: 2

Registration Deadline: 1/5/15

Members—\$20, Non-Members \$30

2) Date: January 23, 2015

Time: Breakfast: 8:00—8:30 AM, Meeting: 8:30 AM to 12:00 PM

Topic: Ethics ASCPA

CPE: 4

Registration Deadline: 1/16/15

Members—\$100, Non-Members \$130

3) Date: January 28, 2015

Time: Lunch: 11:30 AM—12:00 PM, Meeting: 12:00—1:50 PM

Topic: Strengthening Grants Management

CPE: 2

Registration Deadline: 1/23/15

Members—\$20, Non-Members \$30

Register @:

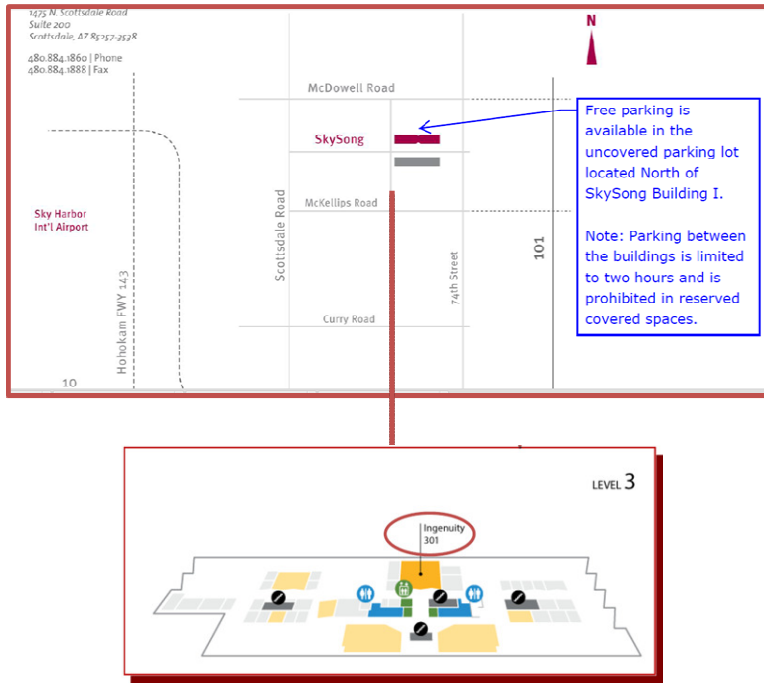
www.agaphoenix.eventbrite.com



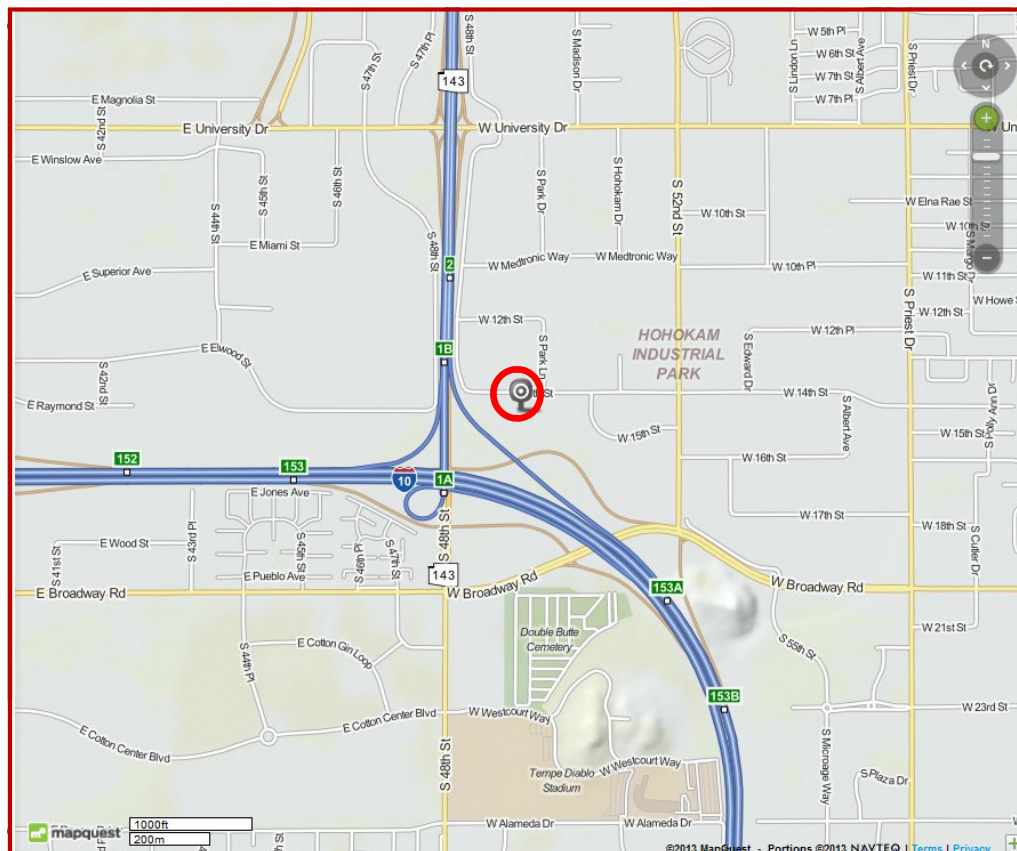
CAN FOOD DRIVE:
PLEASE SUPPORT YOUR LOCAL, GREATER PHOENIX AREA FOOD BANKS BY BRINGING IN YOUR CANNED FOOD ITEMS TO ANY MEETING, FOR PROGRAM YEAR 2014-2015



Meeting Location Map—ASU Skysong Campus: Auditing / Internal Controls (January 14th) and Strengthening Grants Management (January 23rd)



Meeting Location Map—Maricopa Community College: Ethics ASCPA (January 23rd)





**PROFESSIONAL ETHICS UPDATE FOR ARIZONA CPAs –
INCLUDING CASE STUDIES**
(Complimentary breakfast sponsored by the AGA, Phoenix Chapter)

January 23, 2015

Location: MCCC D Governing Board Room
2411 W 14th St, 2nd floor
Tempe, AZ - 85281

Schedule:
Sign-in begins: 8:00am
Program: 8:30 am -12:00 pm

FEES:

AGA Members: \$100

Non-Members: \$130

Recommended CPE credit: 4 hours

Discussion Leader: Gilbert B. Blumenthal, CPA

Constantly updated, this course is designed to meet the Arizona biennial four-hour ethics CPE requirement for CPAs renewing their licenses. In addition to meeting Arizona State Board of Accountancy requirements, the course includes materials designed to reinforce the CPA's practical understanding of professional ethics standards. In times such as those we are facing, all CPAs likely will be dealing with new and difficult challenges. These challenges will require that a CPA has a firm grasp of the professional ethics standards as well as an increased awareness of both accounting and business ethical issues.

Objectives: To reinforce skills enabling a CPA to: Identify standards, state laws and other factors critical to making ethical accounting and business decisions; Recognize technical considerations in the analysis and resolution of ethical dilemmas; Practical application of professional ethics standards to both public accounting and business situations; Fulfill responsibilities as required by the Arizona State Board of Accountancy

Course Highlights: Review of ethics standards for Arizona CPAs including the AICPA Code of Professional Conduct and the Arizona Accountancy Statutes and Rules. Updates include the latest ethics guidance as well as "hot topics" in professional ethics. Interactive case studies are designed to illustrate the application of ethics standards as they relate to real-life situations.

Who should attend: CPAs seeking ethics training or fulfilling ethics requirement.

Gilbert B. Blumenthal, CPA has been active in the Arizona CPA community for over 25 years. After a long career in public accounting, Gil has focused his professional efforts in the areas of dispute resolution, business consulting and teaching. He is a former shareholder and Managing Partner of a large local firm (now Clifton Gunderson, LLP) in Phoenix. Prior to that, he received his training while with two of the former "Big 8" CPA firms. Working as a neutral for the past twelve years, Gil has been appointed Special Master and Settlement Master in both Civil and Domestic Relations cases. He has testified numerous times as an expert witness in the Superior Court of Arizona. He also uses his extensive public accounting background to provide mediation and arbitration services in cases involving complex business or financial disputes. Gil has been a frequent instructor of professional education programs for Attorneys and CPAs. In 2004, he wrote and has been the primary instructor for the Professional Ethics course for Arizona CPAs. He has also served on the faculty of the Judicial College of Arizona for the New Judge Orientation Program. He has published numerous articles for accounting and business publications and has been a frequent speaker for local and regional professional organizations. Gil received the 1994-95 Excellence in Writing Award from the Arizona Society of CPAs for his article entitled Alternative Dispute Resolution for CPA's - Beyond the Liability Issues. He has also served on the Arizona Society of Certified Public Accountants' Board of Directors.



(Please note that registration must be completed prior to the event date)

Please schedule yourself to be on time as the program begins promptly at 8:30 AM.

Registration Deadline date: 01/16/2015

REGISTRATION FORM - (One form per person)

Name: _____

Company: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Fax: _____

E-Mail: _____

Check all that apply: ASCPA Member CPA Non-Member
 AGA Member Not a CPA

Method of Payment: Online registration using Eventbrite at agaphoenix.eventbrite.com/
Registration form not needed if registering via Eventbrite.

Please contact us at eventreg@agaphoenix.org with any questions.

**AGA Phoenix Chapter
PO Box: 64911
Phoenix, AZ 85082-4911**

Eventbrite is our preferred method of payment.

VOLUNTEERS NEEDED!



City of Phoenix 2014 - 2015 EITC Campaign Earned Income Tax Credit

The VITA program offers free tax help to low-to-moderate income individuals and families who cannot prepare their own tax returns. Volunteers receive **FREE** training by the IRS on how to prepare a basic tax return. The tax preparation sites are located throughout Phoenix. There are a variety of volunteer opportunities within the VITA program, tax preparers, greeters, site coordinators and instructors.

Benefits of becoming a VITA volunteer:

- FREE Training
- Economic Growth to the Economy
- Satisfaction of Helping Others



City of Phoenix

For more information or to volunteer, call 602-534-0543 or email: phoenix.gov/eitc or go to www.phoenix.gov/humanservices/programs/volunteer/vita-tax

AGA Phoenix Chapter, Treasurer's Reports - November 2014

Treasurer's Report

Book Balance 10/31/2014	\$7,648.65
Receipts	\$489.27
Disbursements	\$586.84
Book Balance 11/30/14	<u>\$7,551.08</u>
Outstanding Checks	\$0.00
Outstanding Deposits	\$0.00
Adjusted Book Balance	<u>\$7,551.08</u>
<u>Account Balance</u>	
Cash on Hand	\$50.00
Savings Balance	\$5.00
Your Savings Balance	\$307.35
Scholarship Fund	\$397.94
Share Certificate (12 Month)	\$5,646.06
Checking Balance	<u>\$1,144.73</u>
	<u>\$7,551.08</u>
Difference Adjusted Book vs Bank	<input type="text" value="\$0.00"/>

Balance Sheet

11/30/2014

Cash and Bank Accounts	
Cash on Hand	\$50.00
Savings Balance	\$5.00
Your Savings Balance	\$307.35
Scholarship Fund	\$397.94
Share Certificate(12 month)	\$5,646.06
Checking Balance	<u>\$1,144.73</u>
TOTAL Cash and Bank Accounts	<u>\$7,551.08</u>
Inventory	<u>\$22.98</u>
Speaker Gifts	<u>\$20.00</u>
TOTAL ASSETS	<u>\$7,594.06</u>
LIABILITIES & EQUITY	
TOTAL Liabilities	<u>\$0</u>
Equity	<u>\$7,594.06</u>

**Association of Government Accountants
Phoenix Chapter
Education and Meeting Plan
2014-2015 Program Year**

Date	Event	Topic	CPE Credit	Registration Deadline	Location
9/24/2014	Chapter Meeting-Lunch 10:30am-11:00am-Audio Conference 11:00am-12:50pm	Using a Stat System to Manage State and Local Government Programs	2	9/19/2014	ASU Skysong Global Room 201 1475 N Scottsdale Rd. Scottsdale, AZ 85257
10/8/2014	Chapter Meeting-Lunch 10:30am-11:00am-Audio Conference 11:00am-12:50pm	Wow! She stole that much?	2	10/3/2014	ASU Skysong Global Room 201 1475 N Scottsdale Rd. Scottsdale, AZ 85257
10/22/2014	Chapter Meeting-Lunch 10:30am-11:00am-Education Seminar 11:00am-12:50pm	Arizona & Higher Education—2014 & Beyond	2	10/17/2014	ASU Skysong Global Room 201 1475 N Scottsdale Rd. Scottsdale, AZ 85257
11/19/2014	Chapter Meeting-Lunch 11:30am-12:00pm-Audio Conference 12:00pm-1:50pm	Fraud Risk Management	2	11/14/2014	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
12/10/2014	Chapter Meeting-Lunch 11:30am-12:00pm-Audio Conference 12:00pm-1:50pm	How do you spell success? E-T-H-I-C-S Holiday Social	2	12/5/2014	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
1/14/2015	Chapter Meeting-Lunch 11:30am-12:00pm-Audio Conference 12:00pm-1:50pm	Auditing / Internal Controls	2	1/5/2015	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
1/23/15*	8:00am-8:30am Continental Breakfast 8:30am-12:00pm-class	Ethics - ASCPA	4	1/16/2015	Maricopa Community College 2411 W. 14th Street Tempe, Arizona 85281
1/28/2015	Chapter Meeting-Lunch 11:30am-12:00pm-Audio Conference 12:00pm-1:50pm	Strengthening Grants Management	2	1/23/2015	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
2/4/2015	Chapter Meeting-Lunch 11:30am-12:00pm	ASRS	1	1/30/2015	ASU Skysong, Room Synergy 1 1475 N Scottsdale Rd. Scottsdale, AZ 85257
	12:00pm-12:50pm	Deferred Comp	1		
	1:00pm-1:50pm	Federal Tax Update	1		
	1:50pm-2:40pm	State Tax Update	1		
	2:40pm-3:30pm	State Tax Update	1		

**Association of Government Accountants
Phoenix Chapter
Education and Meeting Plan
2014-2015 Program Year**

Date	Event	Topic	CPE Credit	Registration Dead-line	Location
3/4/2015	Chapter Meeting-Lunch 11:30am-12:00pm-Audio Conference 12:00pm-1:50pm	Government Financial Management	2	2/27/2014	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
4/17/2015*	8:00am-4:00pm PDC	Keynote - AGA Pres	2	4/10/2015	Rio Salado College 2323 W. 14th St. Tempe, AZ 85281
		Grants Management	1		
		State Treasurer	1		
		GASB Updates (Keith Dommer AG)	2		
		IT Security	1		
		Fraud Detection / Data Mining	1		
5/13/2015	Chapter Meeting-Lunch 10:30am-11:00am- Education Seminar 11:30am-12:50pm	TBD Live	2		ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
6/3/2015	Chapter Meeting-Lunch 10:30am-11:00am- Education Seminar 11:30am-12:50pm	TBD Live	2		ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
			36		

*These events are not monthly chapter meetings and will be at an additional cost. Details will be provided in future newsletters and/or on the Calendar of Events page on our website.

Prospective members are welcome to learn more about us by attending a monthly chapter meeting. Registration per monthly chapter meeting date, which includes lunch, is as follows:

Members:

\$20 each monthly chapter meeting, or package deal—\$180 for all sessions

*excludes special events (Ethics and Professional Development Conference—PDC)

Non-Members

\$30 each monthly chapter meeting

To RSVP, please go to our online registration site: <http://agaphoenix.eventbrite.com>

Thank you for your interest!

Announcements - Job Postings

Internal Auditor, Pinal County. Salary range of \$51,854.40—\$54,496. The incumbent will conduct financial, compliance and operational audits of varying complexity and subject matter; perform special projects, studies and investigations, as assigned; and apply generally accepted accounting principles, government auditing standards, and professional internal auditing standards, as applicable, in completion of all audit duties. This is an Advanced Working/Journey position, which works under general supervision. Positions at this level are assigned to perform the more complex and sensitive duties in the occupational field. The employee in this position may be assigned to train other employees and/or monitor the work produced by other employees. The employee performs diverse duties of an advanced and specialized nature. Judgment must be exercised in analyzing facts and circumstances surrounding issues. Work often requires development of recommendations and independent actions consistent with policies, general directives, and broad regulations. The decisions made affect the operations of the work unit and the organization. Discretion is required in the application of policies, procedures and guidelines, and in selection of appropriate resources for use in accomplishing assigned work.

Minimum Qualifications: Bachelors degree in Accounting, Finance or Public Administration. Three (3) years of experience in internal auditing. Governmental auditing experience is preferred. Certification, such as Certified Public Accountant (CPA), Certified Internal Auditor (CIA), or Certified Government Auditing Professional (CGAP), is preferred. Post graduate education may substitute for certification and/or experience requirements.

Apply on-line at: www.pinaljobs.com/applicants/jsp/shared/Welcome_css.jsp

General Ledger Accountant, AZ Lottery. Salary range of \$37,000-\$49,500. Exercises practical experience and professional judgment in applying Generally Accepted Accounting Principles (GAAP) in a government enterprise enterprise and sales oriented business. Participates in documentation and entry of transactions in the State Financial System (AFIS), the human resources information system (HRIS), AZ Procurement System (ProcureAZ) and the Lottery General Ledger System. Performs detailed analysis and interpretation of financial records, reconciles accounts and participates in the budget process. Reviews, analyzes and approves various fiscal transactions including accounts payable, accounts receivable, collections, billing, invoice payments and payroll transactions. Assists in the compilation of audit work, agency financial statements and management reports for year-end purposes. Assists in resolving problems and questions presented by management regarding accounting transactions and reports. Makes recommendations designed to solve problems and improve operations to ensure compliance with outside auditing standards. Designs or recommends modifications for automated reporting systems, performance testing and implementation of automated systems.

Preferred Qualifications: B.S. with major in Accounting, AZ CPA, 3 years prior accounting and supervisory experience.

Apply on-line at: <https://azstatejobs.azdoa.gov/>

Cont'd Announcements - Job Postings

Vice President, Business, Management and Financial Affairs. AZ Board of Regents. The Vice President serves as the Board's counterpart to university Chief Financial Officers, works in collaboration with senior university officials and has responsibility for developing and implementing comprehensive financial reporting and accountability mechanisms for the Arizona University System.

The VP works directly with the Board, Board President, and senior university representatives on business and finance issues such as budget requests, financial reporting, tuition and fee setting. This position serves as principal Board office representative for issues related to university strategic and business planning and Board financial goals and objectives. Serves as the principal Board office representative for Board of Regent's committees on financial issues and administers or participates in special projects, as directed by the Board President. Monitors financial condition of the Board and universities and coordinates system-wide analyses of complex financial issues. Advises and assists in the development, maintenance, and implementation of the Regents' and universities' long-range business and strategic plans. Leads a team responsible for analyzing and reporting on university and Board financial affairs, makes recommendations for improvements and develops financial policies and procedures for the Arizona University System. The VP serves as a liaison with various state and national organizations, as assigned by the Board President. The VP will develop a collaborative team with the university Chief Financial Officers and support the university staff in achieving their missions and individual goals.

Minimum Qualifications: Bachelor's degree in Business, Finance, Policy Analysis or related field plus ten years progressively responsible experience in public or business administration or any equivalent combination of experience and/or education from which comparable knowledge, skill, and abilities have been achieved.

Apply by e-mail at: hr@azregents.edu

Assistant City Auditor, Business, City of Glendale. Salary range of \$63,924—\$102,278. Participates in conducting highly complex performance audits of municipal departments, divisions, functions or activities, information systems and firms doing business with the City. Prepares reports documenting audit results and recommendations. The position performs complex audits that are politically sensitive or require a higher level of expertise and judgment.

Minimum Qualifications: Bachelor's degree in Accounting and five years of experience in public accounting or internal auditing including experience in information technology auditing including one year in a supervisory capacity.

Would you like to post your organization's job postings on our website?

Please email AGA Phoenix Webmaster, Karie Tepper, at webmaster@agaphoenix.org.

Goals for 2014-2015 and Beyond

- Provide high quality, low-cost continuing professional education to the membership and the government accounting community.
- Promote the value of AGA membership in order to retain and expand membership.
- Promote the value of the Certified Government Financial Management (CGFM) program.
- Promote government financial management to schools and colleges and become spokespersons for the advancement of government accountability through quality course offerings to students.
- Seek National AGA support for a consistent local web site format and the technical support necessary to provide a web base venue that the membership can use to research current information relating to the Phoenix chapter.
- Promote networking among membership at chapter events.
- Promote Executive Board membership in order to diversify our ideas and strengthen our focus.
- Expand AGA membership throughout the state.

CGFM Study Resources Available:



For AGA members interested in taking the CGFM please contact our CGFM chair Elisa Gin at cgfm@agaphoenix.org for more information. Currently there is 1 complete set of materials available for check out.

Also, successful CGFM candidates can apply for reimbursement of the application and examination costs.

Contact our CGFM chair for step by step instructions on the CGFM process:

cgfm@agaphoenix.org

AGA Phoenix Chapter Executive Board Program Year 2014-2015

PURPOSE: Consists of chapter officers, past president, committee chairs, and other members appointed by the chapter president. Responsible for all chapter business and planning.

OFFICERS:

President	Josh Consier
President Elect	Gergana Kovatcheva, CGFM, CPA
Past President &	
Secretary	Kim Prendergast, CGFM, CIA, CPA, CGAP
Treasurer	Leslie De'Reche

ADDRESS: AGA Phoenix Chapter, PO Box 64911
Phoenix, AZ 85082-4911

PHONE: (480) 731-8582 **FAX:** (480) 731-8560

EMAIL: AGA@agaphoenix.org

Our Purpose

Mission Statement

AGA Phoenix Chapter serves Arizona professionals in the government financial management community by providing quality, low-cost continuing education, promoting professional development and interaction among members, and fostering a commitment to community involvement as well as a sense of responsibility for advancing government accountability.

Vision

AGA Phoenix Chapter actively creates an avenue for membership to share ideas with each other, to share knowledge and time with the community, and to promote the advancement of government standards and accountability within the profession.

We'd Love Your Input!

Please remember to send in any articles of interest, including any that you may have written on the subjects of management, accounting, or auditing. We welcome your comments and suggestions.

In addition, please send us any special announcements in relation to promotions, marriages, births, anniversaries, certifications achieved, or any other significant event for any of our chapter members. Any article submitted by the second week of the month will be included in the next month's newsletter.

Please email your news for forthcoming newsletters to:

newsletter@agaphoenix.org





Membership Referral Program

Did you know that you can gain \$50 if you get two individuals who are not currently members to join our chapter? All you have to do is have them put your name down on the sponsor section of the membership form.

It is always nice to have new faces become members to our growing organization!

Board Members Wanted

If you are interested in volunteering for a committee and to be on the Board, please contact AGA at the following e-mail:

aga@agaphoenix.org

We Are Always Looking For People Interested In Joining Our Organization

NOTE: Excerpts and links below are from AGA's national website at www.agacgfm.org.

What is AGA?

Briefly, AGA has been serving the government financial management profession for over 50 years. As a not-for-profit educational organization, AGA serves the professional interests of financial managers from the local, state and the federal governments, as well as public accounting firms, responsible for effectively using billions of dollars and other monetary resources everyday. Members are accountants, auditors, contract, financial and performance, budget analysts, chief financial officers, information systems managers, finance directors, inspectors

general, professors, students. Membership in AGA is like tapping into a reservoir of actual real-world knowledge and experience of government financial management experts.

Benefits of Joining

If you asked a member which of the benefits they value the most, they probably would say education and networking, which often occur at the same time and place. Here are some of our members' favorites:

- Continuing Professional Education and Networking Opportunities
- Keep Up-to-Date on Current Issues
- Keep Abreast of the Latest Technologies and Financial Systems
- Professional Guidance and Certification

How Can You Join?

Click the links below to access the Membership Application and to find out membership types and dues.



Click <https://www.agacgfm.org/Membership/Join-or-Renew.aspx>

to complete the online AGA Membership Application.

****Did an AGA member inspire you to join? Don't forget to enter your AGA Sponsor's Name and Member ID on the application.****