



Newsletter

VOLUME 2018, NUMBER 3 DECEMBER 2018

Chapter Leadership 2018-2019 Program Year

Chapter President

Robert Rizzo, NJ Legislative Services - Office of the State Auditor
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Immediate Past President

Andrew C. Bishop, CPA, CGMA. Bishop and Bishop PC
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Chapter Treasurer

Tyler T. Frounfelker, CPA, New Jersey Judiciary
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Membership

Kiersten Marie Kokotajlo, CFE, CICA, NJ Office of the State Auditor
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Administration

Christopher John Schwartz - NJ Dept of Human Services - Division of Mental Health
christopher.schwartz@dhs.state.nj.us

Webmaster

Brian Larkin - NJ Office of the State Auditor
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Chapter President-Elect

Nikki Farrell, CICA - New Jersey Office of the State Auditor
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Secretary

Michelle C. Blatt - New Jersey Office of the State Comptroller
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Education

Nikki Farrell, CICA - New Jersey Office of the State Auditor
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Programs

Christopher John Schwartz - NJ Dept of Human Services - Division of Mental Health
christopher.schwartz@dhs.state.nj.us

Nominations

Andrew C. Bishop, CPA, CGMA - Bishop and Bishop PC
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President's Message

Robert Rizzo

Dear Members and Friends,

I can't believe it's December already! This year is just flying by and the holiday season is now upon us! Hopefully everyone had a Happy Thanksgiving!

In Trenton Chapter news, we recently had our annual Fall Seminar. I want to thank everyone who attended. On behalf of our Chapter, we hope you enjoyed it. Do not forget to fill out those surveys to help us get a better idea on how we can improve for the Spring Symposium in April. I also want to thank the Fall Seminar committee and everyone who helped out planning and preparing the event. So much time and effort went into the Seminar and I can't thank you enough!

We also had our second dinner meeting of the year on November 14th. I would like to thank Dorothy Guzzo, the Executive Director of the NJ Historic Trust, for taking time out of her day to speak to our Chapter.

I want to let you know about upcoming events for the New Year. Our next dinner meeting will be our annual tax update. It will take place on Wednesday, January 9 at 5:30 PM at Tessara Restaurant in Hamilton and our guest speakers will be Holly Sabo and Jill Ann Murphy from the Mercadien Group. You can register for this event on our website at <https://www.agacgfm.org/Chapters/Trenton/Training-Events/Event-Calendar/January-Dinner-Meeting.aspx>.

Also on Wednesday, January 9 at 2 PM, we will have our webinar on the topic of grants management. This will take place at the Office of the State Comptroller, 12th Floor Conference Room - 20 West State Street, Trenton, NJ 08625. This webinar is FREE for members! Please register at <https://www.agacgfm.org/Chapters/Trenton/Training-Events/Event-Calendar/Grants-Management-Webinar.aspx>.

I am also pleased to announce that we will be hosting our Fifth Annual Bowling & Networking Event from 4:30 PM - 6:30 PM at Slocum's Bowling Alley in Ewing Twp, NJ on Friday, February 1. This event is FREE for STUDENTS & potential new members and just \$6 for AGA Members. Join us for fun, bowling, appetizers, & networking! Registration will soon be available on our website.

As I mentioned before, any questions or comments, please feel free to reach out. Until next time.

Take care,
Robert Rizzo
Trenton Chapter President



SAVE THE DATE



Washington, D.C.
January 10, 2019
6 CPEs

Registration is now open for the 2019 Financial Systems Summit!

Start off the new year right by taking advantage of a significant benefit of your AGA membership — the **Financial Systems Summit** (FSS). Join us in Washington, D.C., or stream the summit online at your home or office — either way, your participation is complimentary.

FSS will bring together government leaders and industry experts to discuss how to improve government services through systems modernization in a budget-constrained environment. Sessions will highlight CIO/CFO priorities, agile, shared services, cyber security and emerging technologies.

WEBINARS

- **Grants Management – Wednesday, January 9, 2019**
- Where: 12th Floor Conference Room, Office of the State Comptroller
- Time: 2:00 PM-3:50 PM
- 2 CPEs
- Field of Study: MGMT
- **GASB Update – Wednesday, February 6, 2019**
- Where: 12th Floor Conference Room, Office of the State Comptroller
- Time: 2:00 PM-3:50 PM
- 2 CPEs
- Field of Study: ACCG

[Register Online](#)

UPCOMING EVENTS

- **January 2019 Dinner Meeting: Tax Update (1) CPE – Wednesday, January 9, 2019**
 - Guest Speaker: Holly Sabo and Jill Ann Murphy, Mercadien
 - Where: Tessara Restaurant, 812 NJ-33, Trenton, NJ 08619
 - Time: Social Hour begins at 5:30 PM; Dinner and Presentation to Follow
 - Guest Speakers' biographies on next page



- **January 9, 2019 Dinner Meeting:**

Guest Co-Speaker: Holly Sabo, CPA/PFS, MST, CGMA - Manager, Mercadien, P.C.

A manager in the tax department of Mercadien, P.C., Certified Public Accountants and a key member of the Individual Services Group, Holly Sabo works extensively with businesses and individuals, providing expert financial, tax and estate planning strategies customized to fit their individual needs.

Ms. Sabo has in-depth experience with individual and fiduciary income tax planning, federal and state tax compliance matters, as well as estate and gift transfer tax planning. Through this broad base of expertise, she is able to offer valuable insights and guidance to her clients on these matters. Additionally, Holly helps her clients plan for significant milestones in their lives, so they are prepared and feel confident in knowing they have their affairs in order.

Ms. Sabo specializes in private foundation management and compliance reporting. She assists with Mercadien's in-house training of all professionals and has been instrumental in the development of continuing professional education programs. Holly is a frequent author in a nationally syndicated newsletter and has performed management consulting and accounting services for numerous special projects.

A Personal Financial Specialist (PFS), Holly is a magna cum laude graduate of the College of New Jersey, earning a Bachelor of Science degree in Accounting. She achieved her Masters in Taxation from Philadelphia University, from which she received the 2010 Outstanding Master of Taxation student award. She is licensed in the state of NJ and is a member of the American Institute, NJ Society of Certified Public Accountants, and a member of the Mercer County Estate Planning Council. In addition to her professional activities, Holly volunteers time and serves as treasurer to the Learning Cooperatives of Princeton, Bucks and Raritan. She also volunteers with the AICPA to develop exam items for the CPA exam. She resides in Hamilton Township, NJ with her husband and son.



- **January 9, 2019 Dinner Meeting:**

Guest Co-Speaker: Jill Ann Murphy, CPA, CGMA - Director, Mercadien, P.C.

Jill Ann Murphy tells her team, and her clients, to “take one day at a time.” As a Director with Mercadien, Jill Ann knows how overwhelming life can be. It’s her positive attitude and focus that gets her and her clients through the day. As part of Mercadien’s Individual Services Group, she focuses on tax preparation and reviewing tax returns, gift tax returns, United States estate (and generation-skipping transfer) tax returns, as well as trust, estate and financial planning, helping individuals ensure their finances are in order. Knowing that some clients may be going through significant changes, Jill Ann approaches every situation calmly, confidently, and focused. She is always available to her clients, helping them whether an issue is large or small.

Jill Ann is also known as a problem-solver. She never shies away from a challenge. As part of Mercadien’s Outsourced Accounting and CFO Services Group, she’s ready to jump in and work with your team to accomplish your goals. Her focused approach will get your organization through any challenge regardless of whether it’s bookkeeping, executive transitioning, or preparing financial statements. She will be by your side the entire way.

Before transitioning to her current role, Jill Ann worked with the Government Services Group at Mercadien. She was a member of the GASB Task Force, and worked with numerous municipalities and governmental units managing large audit engagements. Jill Ann also worked with nonprofit organizations, improving their audit efficiency.

Jill Ann began her accounting career with a firm that was part of what is now The Mercadien Group. Since then, she has continued to grow with Mercadien, and still works closely with several former co-workers, who are now clients.

Jill Ann received her Bachelor of Science degree in Accounting from Kean University and serves as a board member for Lakeview Child Center and EASEL Animal Rescue.



SAVE THE DATE!

**Association of Government Accountants
Bowling & Networking Event
Friday, February 1, 2019**

4:30 PM - 6:30 PM

Slocum's Bowling Alley

1675 Pennington Road, Ewing, NJ

FREE for STUDENTS & Potential New Members!

\$6 for AGA Members

Join us for bowling, appetizers, & networking opportunities!

www.agacgfm.org/trenton ~ [Facebook.com/agatrentonchapter](https://www.facebook.com/agatrentonchapter)



RECENT ACCOMPLISHMENTS

Members' Spotlight

Congratulations!

Brian Larkin for passing the Certified Internal Auditor(CIA) Exam. We congratulate you on your accomplishment and are very proud to have you as a member of the AGA – Trenton Chapter.

Congratulations!

Digesh Patel
For being promoted to Managing Director and Principal of the Mercadien Group!



AGA – Trenton members and volunteers at Trenton Area Soup Kitchen – November 6, 2018



THANK YOU TO OUR SPONSORS!



The mission of the MCIA is to serve the needs of Mercer County improving the quality of life for the residents by providing programs and services for the County, Municipalities, school and fire districts, and not-for-profits in the areas of financing, project management, redevelopment, solid waste and recycling.



KPMG LLP, the U.S. audit, tax, and advisory services firm, operates from 87 offices with more than 23,000 employees and partners throughout the U.S. The firm’s purpose is to turn knowledge into value for the benefit of their clients, people, and capital markets.



Today, Mercadien’s focuses on four primary service areas: Accounting, Consulting, Technology and Wealth Management; work with a wide range of clients throughout the U.S. and in Europe; have a diverse team of dedicated associates, and invest in the most cutting-edge technology and office facilities to ensure Mercadien remains a firm of the future. The firm’s leadership team consists of 18 managing directors. Sought-after experts in their practice areas, they are seasoned when it comes to owning and running businesses, solving industry and economic challenges, and building partnerships.

**STATEMENT OF FINANCIAL POSITION
PERIOD ENDING 11/30/2018**

ASSETS:		LIABILITIES AND EQUITY:	
Cash (BOA)-		Accounts	
Savings	\$12,183.94	Payable	\$691.16
Cash(BOA)		Deferred	
Checking	\$13,329.76	Income	\$110.00
Accts. Rec. -			
Symp/mtg/Sem	\$875.00	Fund	
PrePaid		Balance	\$27,819.10
Expenses	\$2,231.56	TOTAL	
TOTAL		L&E	
ASSETS	\$28,620.26		\$28,620.26



CHAPTER DIRECTORS - 2018-2019 PROGRAM YEAR

President - Robert Rizzo

President Elect/VP of Education - Nikki Farrell

Immediate Past President/Nominating Committee Chair- Andy Bishop

VP of Membership - Kiersten Kokotajlo

VP of Finance/Administration/Programs - Christopher Schwartz

Treasurer - Tyler Frounfelker

Secretary - Michelle Blatt

Fall Seminar – Co-chairs: Robert Rizzo/Jessica Lippincott + Fall Seminar Committee includes but not limited to Rene Gervasoni, Andy Bishop, Brian Larkin, Tyler Frounfelker, and Marie Samson

Spring Symposium – Co-chairs: Robert Rizzo/Chrissy Brennan + Spring Symposium Committee includes but not limited to Meghan Ellis and Mike Salberta

Audio Conferences - Michelle Blatt/Thalia Treby

Sponsorship - Guy Tassi

Chapter Recognition - Brian Larkin

CGFM Chairperson - Margarita Stanislavskaya

Community Service - Stephanie Rybak/Chris Fuccello

Awards - Christopher Schwartz

Early Career - Taylor Leavy

Budget/Finance - Dave Illuminate

Newsletter - Marie Samson

Meeting Chair - Rene Gervasoni

Paul Vidunas Coordinator - Jennifer Suchan

Historian - Rose Todaro

By-Laws – David Kaschak

Accountability Outreach Chair - Kiersten Kokotajlo

Webmaster/Communications - Brian Larkin

Contact us

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Facebook: <https://www.facebook.com/AGATrentonNJ/>

Website: <https://www.agacgfm.org/Chapters/Trenton/Home.aspx>

LinkedIn: <https://www.linkedin.com/company/trenton-aga>