



# Newsletter

VOLUME 2017, NUMBER 4

DECEMBER, 2017

## President's Message

Andrew Bishop, CPA / CGMA

Dear Members & Friends:

It's hard to believe that 2017 will be coming to a close at the end of the month. With that being said, it is time to start planning for the New Year! We have a bundle of events and activities planned!

Our hope is that we, your AGA Trenton Chapter, have provided you with the quality events and benefits you come to expect!

A special thanks goes to our November Dinner speaker, Carole Hedinger, CPA and Executive Director of the New Jersey Lottery. Ms. Hedinger's presentation on the intricacies of the NJ Lottery today was not only intriguing, but was very informative.

The AGA will be supporting several events as we move forward into the New Year

- 1) Our annual tax update will be presented by Holly Sabo and JillAnn Murphy, both are tax professionals with the Mercadien Group (<https://www.mercadien.com/>), on Wednesday, January 10, 2018 at Tessara's Restaurant. Happy hour begins at 5:30 pm with the presentation to follow. Register for this event now: <https://www.agacgfm.org/Chapters/Trenton/Training-Events/Event-Calendar/January-2018-Dinner-Meeting.aspx>
- 2) On Friday, February 2nd, 2018 we will be hosting our Fourth Annual Bowling & Networking Event from 4:30 PM - 6:30 PM at Slocum's Bowling Alley in Ewing Twp, NJ.

This event is FREE for STUDENTS & potential new members and just \$6 for AGA Members. Don't miss out, join us for fun, bowling, appetizers, & networking!

- 3) Our next Webinar will be held on Wednesday, February 7, 2018 at the Office of the State Comptroller, 12th Floor Conference Room - 20 West State Street, Trenton, NJ 08625. The topic will be "Understanding GASB's New Standards on Leases and Fiduciary Activities". The webinar, which earns 2 CPE credits is free to members and commences at 2 pm. Register for this event now: [https://www.agacgfm.org/Chapters/Trenton/Training-Events/Event-Calendar/Webinar-\(3\).aspx](https://www.agacgfm.org/Chapters/Trenton/Training-Events/Event-Calendar/Webinar-(3).aspx).

Don't forget to check the website for updates as well as pictures from our events & "like" us on Facebook at: <https://www.facebook.com/AGA-Trenton-Chapter-531861283584888/>

Also, check for your local chapter updates on our new LinkedIn page: <https://www.linkedin.com/company/trenton-aga/>

On behalf of the AGA Trenton Chapter, I'd like to wish everyone a safe, happy, and healthy holiday season!! I look forward to seeing everyone in the New Year!

Sincerely,

Andrew (Andy) Bishop  
Trenton Chapter President

Internet:

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

**AGA—Trenton Chapter  
Balance Sheet as of 11/30/17**

<b>ASSETS:</b>		<b>LIABILITIES AND EQUITY:</b>	
Cash (BOA)-Savings	12,181.48	Accounts Payable	998.00
Cash(BOA) Checking Accts. Rec.	12,579.80	Deferred Income	0.00
Symp/Mtg/Sem	225.00		
PrePaid Expenses	4,044.62	Fund Balance	28,032.90
<b>TOTAL ASSETS</b>	<b>29,030.90</b>	<b>TOTAL L&amp;E</b>	<b>29,030.90</b>

## Security Alert!

Be vigilant about email scams. There has been a recent surge in phishing scams where perpetrators are using my name (Andy Bishop) and spoofing my email as president of the chapter. Here's a link documenting prevention tips from National:

<https://aga.informz.net/informzdataservice/onlineversion/ind/bWFpbGluZ2luc3RhbmNlaWQ9NzIwNDMxNSZzdWJzY3JpYmVyaWQ9MTA2NjE3MDkyNg>

## Special News:

Congratulations to Louise Burnette, MPA our Chapter Services Manager. She and her husband are expecting another baby girl this Spring (April 2018)!

# DECEMBER 2017

SUN	MON	TUE	WED	THU	FRI	SAT
					01	02
03	04	05	06 Webinar 2:00pm	07	08	09
10	11	12 	13	14	15	16
17	18	19	20	21	22	23
24	25 	26 	27	28	29	30



**1)** Webinar (from 2:00 to 3:50PM) Office of the State Comptroller, 12th Floor Conference Room - 20 West State Street, Trenton, NJ 08625  
Best Practices for Auditing & Quality Assurance

# JANUARY 2018

SUN	MON	TUE	WED	THU	FRI	SAT
	01 Happy New Year	02	03	04	05	06
07	08	09	10 Dinner Meeting 5:30pm	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			



**1)** Dinner Meeting (Happy Hour starts at 5:30PM) Tessara Restaurant 812  
NJ-33, Hamilton, NJ 08619

**JANUARY 10, 2017**

**Dinner Meeting Guest Co-Speaker:**

**Jill Ann Murphy, CPA, CGMA  
Director, Mercadian P.C.**

Jill Ann Murphy tells her team, and her clients, to “take one day at a time.” As a Director with Mercadian, 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 Mercadian’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 Mercadian’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 Mercadian. 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 Mercadian Group. Since then, she has continued to grow with Mercadian, and still works closely with several former co-workers, who are now clients.

**Personal Facts:** Jill Ann enjoys spending time with her family, visiting relatives in Pennsylvania, and watching Sci-Fi television shows.

**Education:** Bachelor of Science Degree in Accounting, Kean University

**Certifications:** Certified Public Accountant, Chartered Global Management Accountant, Certified Government Financial Manager, Public School Accountant

**Community Involvement:** American Institute of Certified Public Accountants, New Jersey Society of Certified Public Accountants, Lakeview Child Center – Board Member, EASEL – Board Member



**JANUARY 10, 2017**

**Dinner Meeting Guest Co-Speaker:**

**Holly Sabo, CPA, MST, CGMA  
Manager, Mercadian P.C.**

A manager in the tax department of Mercadian, P.C., Certified Public Accountants and a key member of the Individual Services Group, Holly Sabo works extensively with businesses, individuals, fiduciaries, nonprofit and governmental authorities. She is also a member of the firm's quality control team for tax compliance and return preparation.

Ms. Sabo's primary focus is on performing tax planning and compliance services and partnership filings. As a result, she works closely with business owners and chief financial officers to help them operate their businesses more efficiently. Holly has in-depth experience with multistate corporate, individual and fiduciary income tax planning, compliance matters, and estate and gift transfer tax planning.

Additionally, Ms. Sabo specializes in private foundation management and compliance reporting. She assists with Mercadian'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 numerous special projects in management consulting and accounting services.

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 Company. Holly resides in Hamilton Township, NJ with her husband and son.



# Save this Date!

## January 10, 2017

### AGA - Trenton Chapter Dinner Meeting

**Who:** Jill Ann Murphy, CPA, CGMA: Director, Mercadian P.C.  
Holly Sabo, CPA, MST, CGMA: Manager, Mercadian P.C.

**Where:** Tessara Restaurant, 812 NJ-33, Hamilton, NJ 08619

**When:** January 10, 2017 - Happy Hour begins at 5:30 pm.

If you have any questions, email us at:

[agatrentoninfo@agatrenton.com](mailto:agatrentoninfo@agatrenton.com)



# SAVE THE DATE!

Association of Government Accountants  
Bowling & Networking Event  
Friday, February 2<sup>nd</sup>, 2018

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!**

**[AGAtrenton.com](http://AGAtrenton.com) ~ [Facebook.com/agatrentonchapter](https://www.facebook.com/agatrentonchapter)**







## Dinner Meetings (2017-2018)

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### January 2018 Dinner Meeting

**January 10, 2018 (Happy Hour starts at 5:30 PM)**

Tessara Restaurant

812 NJ-33, Hamilton, NJ 08619

**Contact:** AGA Trenton Chapter

**Email:** [agatrentoninfo@agatrenton.com](mailto:agatrentoninfo@agatrenton.com)

### March 2018 Dinner Meeting

**March 7, 2018 (Happy Hour starts at 5:30 PM)**

Tessara Restaurant

812 NJ-33, Hamilton, NJ 08619

**Contact:** AGA Trenton Chapter

**Email:** [agatrentoninfo@agatrenton.com](mailto:agatrentoninfo@agatrenton.com)

### Free for members – Financial Systems Summit, Jan. 17

Hear the latest about financial systems and emerging technologies at the Financial Systems Summit, Jan. 17 in Washington D.C. Attend in person\* or participate virtually – registration is free for members and participants earn six CPEs. (\*In-person private-sector participation is available via sponsorship only)

[learn more](#)

### Don't miss National Leadership Training keynote speaker Mark Updegrove

Learn what seven U.S. presidents revealed about leadership and character to historian and author Mark Updegrove at National Leadership Training Feb. 27-28 in Washington, D.C.

[learn more](#)

#### Upcoming Events

View AGA's calendar for national and chapter events.

[learn more](#)

**BRAIN  
TEASER**

[test yourself](#)

#### Chapter Spotlight

**Charleston SC  
Chapter**

Year-end summary  
best practice

[learn more](#)

### Protect your identity this holiday season

Scammers run rampant during the holidays, and their tactics grow more sophisticated each year. To keep your information secure, stay on top of the latest schemes with help from the Federal Trade Commission.

[learn more](#)

### Spring CGFM Intensive Review Course (IRC)

Attend the spring IRC and your exams are on us!

[learn more](#)

 eBook: The Finance Leader's Guide to Balancing Risk and Performance. [ACCESS HERE »](#) 

### Give the gift of membership

Share your love of AGA and its benefits with friends and colleagues. Membership makes a great holiday gift!

[learn more](#)

### Share your views — Governance Town Hall is Dec. 20

AGA's National Executive Committee wants your input. [Review proposals](#) for a new organizational structure then join National President Jim Arnette for a virtual town hall on Dec. 20, 4–5 p.m. ET.

[learn more](#)

## Webinar: Understanding GASB's New Standards on Leases & Fiduciary Activities

Feb. 7 | 2-3:50 p.m. ET | 2 CPEs

Get information about new requirements and gain insight into potential implementation issues

[learn more](#)

## Want to make the most of your membership? Connect locally!

From training seminars to social events, find out what chapters can do for you.

[learn more](#)

## Are you a GS-12 to GS-14?

Partnership for Public Service is gearing up for their 2018 Federal Financial Leaders Program.

[learn more](#)

Opportunity awaits...



Click here to learn more about AGA's Job Board.

## Executive report published

Read the PDT 2017 Executive Session Summary

[learn more](#)

## Your location, AGA's expertise!

### Administrative Rules for Federal Grantees

Your staff will learn when to get approval to change the grant budget, the recipient's responsibilities and how long a recipient must retain records, and more.

[email us](#)

# About the Paul Vidunas Memorial Fund



**City of Angels** *Conquering Our Addictions*  
*If you or a loved one is struggling with addiction, help is available.*  
*Please Call 609-910-4942*

***The Paul Vidunas Memorial Fund*** was established in 1998 shortly after the death of then Trenton Chapter President Paul Vidunas. During his lifetime, Paul was as an enthusiastic volunteer for various community based organizations. The establishment of a fund that would support a variety of community service groups seemed a fitting tribute to this memory.

Each year a different recipient is selected to receive funds collected throughout the program year. The local area charity for this year's Paul Vidunas fund is City of Angels. City of Angels NJ, Inc. offers many different services to the addiction community, all at no charge. Services include interventions, recovery support, Family Program, counseling services and more. COA is a non-denominational, independent organization and all services are open to everyone needing assistance. For information about the charity: <http://www.cityofangelsnj.org/about-coa/>

The Trenton Chapter AGA holds drawings at monthly meetings and educational events to raise funds for the Paul Vidunas Memorial Fund. For more information on how you can contribute to this worthy cause contact the AGA Trenton local chapter now at <https://www.agacgfm.org/Chapters/Trenton/Home.aspx>

*Thank you to all our newsletter sponsors!*



The mission of the Mercer County Improvement Authority (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. Our purpose is to turn knowledge into value for the benefit of our clients, our people, and the capital markets.



Today's Mercadien focuses on team work and effectively allocating resources to be responsive to each client's needs. The Mercadien Group is a family of distinct companies created to serve the diverse and sophisticated needs of our clients in a capacity far greater than any single organization can offer. The group is comprised of six individual companies situated in one location, providing accounting, auditing, tax planning and compliance, management consulting, technology, wealth management, outsourcing, and investment banking services. We are a group of trusted advisors working in one place, sharing a broad knowledge base, and creating seamless solutions to meet your personal and business objectives.

*Thank you to all our newsletter sponsors!*

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# Chapter Officers

2017-2018 Program Year

## Chapter President

**Andrew C. Bishop**

Bishop and Bishop PC

[abishop@BishopandBishoppc.com](mailto:abishop@BishopandBishoppc.com)

## Chapter President-Elect

**Robert Rizzo**

NJ Legislative Services - Office of the  
State Auditor

[rrizzo@njleg.org](mailto:rrizzo@njleg.org)

## Immediate Past President

**Kiersten Marie Kokotajlo, CFE, CICA**

NJ Office of the State Auditor

[kkokotajlo@njleg.org](mailto:kkokotajlo@njleg.org)

## Secretary

**Michelle C. Blatt**

New Jersey Office of the State Comptroller

[michelle.blatt@outlook.com](mailto:michelle.blatt@outlook.com)

## Chapter Treasurer

**David J. Kaschak, CGFM**

NJ Office of the State Auditor

[dkaschak@njleg.org](mailto:dkaschak@njleg.org)

## Education

**Robert Rizzo**

NJ Legislative Services - Office of the State  
Auditor

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## Membership

**Nikki Farrell, CICA**

New Jersey Office of the State Auditor

[nfarrell@njleg.org](mailto:nfarrell@njleg.org)

## Programs

**Christopher John Schwartz**

NJ Dept of Human Services - Division of  
Mental Health

[christopher.schwartz@dhs.state.nj.us](mailto:christopher.schwartz@dhs.state.nj.us)

## Administration

**Christopher John Schwartz**

NJ Dept of Human Services - Division of  
Mental Health

[christopher.schwartz@dhs.state.nj.us](mailto:christopher.schwartz@dhs.state.nj.us)

## Nominations

**Kiersten Marie Kokotajlo, CFE, CICA**

NJ Office of the State Auditor

[kkokotajlo@njleg.org](mailto:kkokotajlo@njleg.org)

## Webmaster

**Nikki Farrell, CICA**

New Jersey Office of the State Auditor

[nfarrell@njleg.org](mailto:nfarrell@njleg.org)



# Chapter Directors

2017-2018 Program Year

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Fall Seminar: Andy Bishop / Rob Rizzo

Spring Symposium: Brian Larkin

Audio Conferences: Michelle Blatt / Thalia Treby

Sponsorship: Guy Tassi / Michael Hoyle

Chapter Recognition: Brian Larkin

CGFM Chairperson (Trenton Chapter): Margarita Stanislavskaya

Community Service: Robert Olsen, Christopher Fucello

Awards: Christopher Schwartz

Chapter Early Career: Meghan Ellis

Budget/Finance: Tyler Frounfelker

Newsletter: Andrew Glodowski

Meeting Chair: Rene Gervasoni

Paul Vidunas Coordinator: Taylor Leavy

Historian: Rose Todaro

By-Laws: Guy Tassi/Michael Hoyle

Accountability Outreach Chair: Kiersten Marie Kokotajlo

Webmaster/Communications: Nikki Farrell

Regional Vice President: Joe Connolly