

From Kristy's Desk

Mark your calendars now, as we have a lot of great educational opportunities coming up in the next few months.

We have our regularly scheduled February meeting on the 19th. Dr Kerri Tassin from Missouri State University will give us an update on changes in the tax code. Also, we have our Spring Seminar on March 28th with a range of topics on the agenda. Please review the details of these events, and we hope to see as many of you as possible!

Additionally, have you ever wondered about how AGA works? Have you been wanting to get more involved? We are currently looking to fill positions on our Chapter Executive Committee. If you are interested in helping out, we have a number of ways in which we need our members to be active. Please feel free to email me at kbork@flyspringfield.com to ask any questions or express interest in helping to maintain a great professional organization.



Have a wonderful week,
and we'll see you soon!

Kristy

Association of Government Accountants
Ozarks Chapter
PO Box 5212
Springfield, Mo 65802



February 19, 2019
425 Downtown (425 Walnut St)
12 PM—1 PM

Tax Updates—Tax Cuts and Jobs Act 2018
Dr. Kerri Tassin
Assistant Professor
Missouri State University

\$10.00 for members
\$15.00 for non-members
Students are always free!

Email [Tammy Beeman](mailto:Tammy.Beeman) to RSVP

Spring Membership Seminar

Come on out to our Spring Seminar on March 28th at the Bass Pro White River Conference Center for a great lineup of topics and 8 hours of CPE.

You'll find the seminar agenda and registration form at the end of this newsletter.



Follow us on Facebook
[@OzarksAGA](https://www.facebook.com/OzarksAGA)

Visit us on the Web
www.ozarksaga.org

Ozarks Chapter Calendar

March 2019 Spring Seminar
White River Conference Center
March 28, 2019, 7:30 AM – 4:30 PM

ENJOY YOUR SUMMER BREAK!

April 2019 Monthly Meeting
425 Downtown
April 16, 2019, 12 PM – 1 PM

SEE YOU IN SEPTEMBER!

May 2019 Monthly Meeting
Tour
May 21, 2019, 12 PM – 1 PM

Join Paul Marshall and Rich Rasa, from the Office of the Inspector General—US Department of Education, as they discuss the [Cooperative Audit Resolution and Oversight Initiative \(CAROI\)](#) on this episode of the “[Accountability Talks](#)” podcast.



February Reading List

Matthew Frankel, “[2019 Tax Changes: Everything You Need To Know](#)”, The Motley Fool, January 2019.

“[2018 Tax Cuts & Jobs Act Overview](#)”, Smith & Howard, Certified Public Accountants and Advisers, March 2018.

Upcoming AGA Webinars

[Tax Reform Update](#)

March 6, 1 PM CST

[Cybersecurity](#)

March 27, 1 PM CST

[Ethics](#)

April 10, 1 PM CST



[Ozarks Chapter Citizen Centric Report 2017-2018](#)

[AGA Citizen Centric Report 2017-2018](#)





Happy Anniversary!

Congratulations to our February membership anniversaries. Thank you for your support of the Ozarks Chapter of AGA!

The Ozarks Chapter would like to welcome Missouri State University students Jordan Reynolds and Javier Adorno-Garcia to AGA!

Linda Charles, City of Springfield
 Jon Cummings, Davis Lynn and Moots
 Shelly Deckand, Missouri State University
 Justin Dement, City of Springfield
 Rick Findley, Taney County
 Rebecca Friedrich, KPM CPAs
 Michel Hackworth, Missouri State University
 Beth Hale, Missouri State University
 Maryjo Kerringer, City of Springfield
 Rachel McGinnis, Missouri State University
 Janet Price, Greene County

Congratulations to Michael Nice and Jordan Reynolds, Missouri State University students, on receiving [National Collegiate Leadership Program](#) student scholarships to attend the National Leadership Training in Washington DC in February 2019!

WE'RE HERE TO HELP OUR MEMBERS

We are committed to supporting our members during the federal shutdown and are proud to offer a **FREE** *Journal* CPE quiz.



[learn more](#)

Our National AGA office is offering academic scholarships for both undergraduate and graduate studies in Accounting, Finance, Information Technology, Economics and Public Administration.

[2019 academic scholarship applications](#) are available now for full-time and part-time students.



DID YOU KNOW??

The United States Supreme Court met for the 1st time on February 1, 1790.

President's Day was originally established in 1885 to recognize George Washington's birthday. The holiday became more popularly known as President's Day after the Uniform Monday Holiday Act in 1971.

Your Ozarks Chapter Executive Committee (CEC) is still accepting Committee volunteers for your 2019-2020 program year, which starts July 1.

If you want to know more about the positions or are interested in working with a great team to help plan member events and meetings for our upcoming year, please contact a current CEC member. You will find contact information on page 11 of this newsletter.



AGA Award Nominations

Nominations are now open for the AGA's Awards of Distinction. For the list of local and national awards, go to [PDT Awards of Distinction](#). Have you seen an AGA member doing some great things? Do you think he or she deserves an award? Let our CEC members know by March 31, 2019 to get them nominated!

Award winners will be recognized at the 2019 Professional Development Training in New Orleans, Louisiana in July 2019.

Local Job Posting

[Missouri State — Accounting Specialist](#)

[Drury University — Controller](#)

[Isabel's House](#) is making a life changing impact for local children and families in Southwest Missouri by providing round-the-clock care when families are in crisis. In 2017-2018, Isabel's House has supported 333 children and 148 families. They have achieved an outstanding 95% success rate at keeping families together!

Find out how [you can help!](#)





92% of children who have stayed at Isabel's House go home with their families. (1715-17)

PARENTS RELY ON US FOR HELP DURING DIFFICULT CRISES, INCLUDING
Homelessness, domestic violence, stress and mental health, unsafe housing, and hospital stays.

88% of parents who have trusted our team during a crisis report **Less stress** at discharge. (1715-17)

your gifts have provided 26,300+ nights of safe care for more than **3,875 kids** in our community. (since 2007)

isabel's house
Where kids are loved and families are supported

417.865.2273  2750 WEST BENNETT SPRINGFIELD, MO 65802

 TOP 30 CAMPAIGN 2015 - 2016 - 2017  CHARITABLE NON-PROFIT OF THE YEAR

| 10 years of purpose | 10 years of impact | 10 years of success |
|--|--|--|
| <p>The mission of Isabel's House is to provide immediate refuge for children ages birth to 12 whose families are in crisis. By partnering with families and the community, we will strengthen families and prevent child abuse and neglect.</p> <p><i>The average length of a child's stay is 12 days. We have a 1 year family follow-up program.</i></p> | <p><i>"Isabel's House has been an extra support, help, and shoulder for me and my family in my darkest hours. You have taught me there are still loving hearts, good people, and someone who understands. Thank you so much for caring for my daughters. May God bless you always."</i></p> <p><i>Sandra AN ISABEL'S HOUSE MOM</i></p> | <p>A crisis can happen to any family at any time, and Isabel's House has been here to help - at no cost to families - since June, 2007. Your contributions provide hope for parents and 24/7/365 complete care for kids - food, new clothing, safe shelter, nurse needs, transport to school, and so much more.</p> |

DONATE VOLUNTEER GET INVOLVED **WWW.ISABELSHOUSE.ORG**  

| | | |
|---|---|--|
|  <p>Support Isabel's House with your Children's Trust Fund "License to Care"</p> |  <p>Up to 50% Missouri Tax Credits may be available for qualified \$100+ contributions</p> |  <p>A little love each month really adds up: join our monthly giving family!</p> |
|---|---|--|

As we begin 2019, it is time to look ahead and set some goals.

If one of those goals is to become a Certified Government Financial Manager (CGFM), the Ozarks Chapter can help you. Of the chapter's 86 members, there are 21 CGFMs. What is stopping you? For me personally, the benefits of becoming a CGFM have far outweighed the costs.

If you are on the fence about starting down the path of becoming a CGFM, feel free to contact me. I will explain those benefits as well as how the Ozarks Chapter can help you reach your goal.

Monica Robinson, CGFM
City of Marshfield
mrobinson@marshfieldmo.gov



**New Year.
New you.**

Certified Government Financial Manager® (CGFM®) highlights your achievements, serves as a tangible indicator of your experience and knowledge and stays with you throughout your career.

AGA Ozarks Chapter has the resources to help you to achieve certification. For more information contact Monica Robinson at mrobinson@marshfieldmo.gov.

EXPAND YOUR CAREER OPTIONS

ENHANCE YOUR MARKETABILITY

DISTINGUISH YOURSELF

ADVANCE YOUR CAREER

INCREASE AND SHOWCASE YOUR KNOWLEDGE

CGFM[®]

CEC Meeting Minutes

January 24, 2019

**Busch Municipal Building, 840 Boonville Ave
1st floor conference room**

Members Present:

Kristy Bork, President; Greg Drake, Communications; Tammy Beeman, Membership; Teresa Allen, Webmaster; Jennifer Schatzer, Co-Education Chair; Renee Vines, Co-Education Chair; Jo Garcia, President-Elect

Call to Order

President Kristy Bork called the meeting to order at 12:02 PM.

National Council of Chapters (NCC) Representative

Greg Drake was approved to serve as the Ozarks Chapter NCC Representative. As such, he is required to attend the National Lead! Conference and the National Professional Development Training (PDT) on behalf of the Chapter.

For several years, the Chapter has paid for the President-Elect to attend the National PDT, and it was offered to Jo Garcia before the new National governance structure and requirements were announced. The Board approved to amend the 2018-2019 budget to send both the President-Elect and the NCC Representative in 2019. The cost for both Ozark Chapter representatives for flights and PDT registration will be paid from the 2018-2019 budget. Any remaining expenses (after PDT) will be paid from the 2019-2020 budget. Jo Garcia and Greg Drake will use the Chapter's hotel scholarships provided by the National office.

The decision to send both the President-Elect and NCC Representative to the 2019-2020 PDT will be discussed and voted on at a future meeting.

Secretary/Treasurer—Sarah Burrows

Absent. No report.

CEC Meeting Minutes, continued

January 24, 2019

**Busch Municipal Building, 840 Boonville Ave
1st floor conference room**

President-Elect—Jo Garcia

Chapter Recognition Points (CRP) are due by March 31.

Education—Jennifer Shatzer and Renee Vines

A legislative update and a tax update were discussed as possible ideas for the February meeting. It was decided to try a legislative update sometime in the Fall.

The Spring Seminar agenda and speaker confirmations are almost finished. The tentative agenda and registration form will be sent to members next week.

Membership—Tammy Beeman

No report.

Accountability—Brandie Fisher

No report.

Communications—Greg Drake

The deadline for the February 2019 newsletter items is February 4.

Website—Teresa Allen

No report.

Community Service—Shari Wyly

No report.

CEC Meeting Minutes, continued

January 24, 2019

**Busch Municipal Building, 840 Boonville Ave
1st floor conference room**

Early Career—Julie Ravenscraft

3 Missouri State University students received the National Collegiate Leadership Scholarship to attend the National Leadership Training in DC in February 2019.

Final comments

990 Update—Jennifer Schatzer: It is recommended to reapply and go through the process from the beginning with the IRS and Missouri Secretary of State. Sarah will submit it, and we will get a new TIN number. WE will have to change our legal entity name. The hope is to be complete with the process by July 1.

SLMR and Lead! 2019 Training Opportunities—The offer is still available to Board members to attend the SLMR and Lead! 2019. Lead will be in late April in Kansas City. Jo Garcia and Greg Drake will be required to attend. There is one more Board position available to attend on the Chapter's behalf.

Meeting Adjourned

**Association of Government Accountants
Ozarks Chapter
Fiscal Year 2019
January 1, 2019 Through January 31, 2019**

| Revenues: | FY19 Budget Revenue | FY19 Actual Revenue | Jan '19 Revenue |
|--------------------------------------|--------------------------------|--------------------------------|----------------------------|
| Chapter Dues | 383.05 | 55.00 | 5.00 |
| Monthly meetings | 1,400.00 | 330.00 | - |
| Seminars: | | - | |
| Fall Seminar | 3,905.00 | 3,140.00 | - |
| Fall Seminar Sponsorships | 666.67 | - | - |
| Spring Membership Seminar | 12,688.33 | - | - |
| Spring Seminar Sponsorships | 1,000.00 | - | - |
| Other Revenues: | | - | |
| Recruiting stipend from National AGA | 8.33 | - | - |
| Charity Fundraiser | 479.00 | 125.00 | - |
| Membership Appreciation Night(s) | 65.33 | - | - |
| SLMR Event | 207.11 | - | - |
| Miscellaneous Revenue | 21.67 | - | - |
| Interest | 7.73 | 5.39 | 0.78 |
| Total Revenues | \$ 20,832.22 | \$ 3,655.39 | \$ 5.78 |

| Expenses: | FY19 Budget Expense | FY19 Actual Expense | Jan '19 Expense |
|--|--------------------------------|--------------------------------|----------------------------|
| Monthly Meeting Expenses: | 1,476.63 | 449.03 | 14.00 |
| Seminar Expenses: | | - | |
| Fall Seminar | 2,376.54 | 1,802.71 | - |
| Spring Membership Seminar-Expenses | 3,500.20 | 500.00 | 500.00 |
| Spring Membership Seminar-Dues | 7,575.00 | 100.00 | - |
| Community Service Expense | 696.26 | 125.00 | - |
| Scholarships: | | - | |
| Educational (Post Secondary Ed) Scholarships | 500.00 | - | - |
| CGFM (Member) scholarships | 250.00 | - | - |
| PDC (CEC)Travel Stipend | 1,464.00 | 217.60 | - |
| Membership Drive Expense | - | - | - |
| Membership Appreciation Night(s) | 222.33 | - | - |
| Replenish speaker gifts | 394.67 | - | - |
| SLMR Event | 215.44 | - | - |
| Miscellaneous Expense | 1,247.09 | 372.41 | - |
| Total Expenses | \$ 19,918.16 | \$ 3,566.75 | \$ 514.00 |

| Change in Fund Balance: | <u>Projected</u> | <u>Actual</u> | <u>Actual</u> |
|--------------------------------|---------------------|---------------------|---------------------|
| Beginning | 14,923.35 | 14,923.35 | 15,520.21 |
| Revenue | 20,832.22 | 3,655.39 | 5.78 |
| Expenses | (19,918.16) | (3,566.75) | (514.00) |
| Net Change | 914.06 | 88.64 | (508.22) |
| Ending | \$ 15,837.41 | \$ 15,011.99 | \$ 15,011.99 |

Ozarks AGA Executive Committee

President

[Kristy Bork, CPA](#)

Assistant Director of Aviation—Finance
Springfield—Branson National Airport

President-Elect

[Jo Garcia, CPA](#)

Secretary

Vacant

Treasurer

[Sarah Burrows, CPA](#)

Audit Supervisor
KPM CPAs

Membership

[Tammy Beeman, CGFM](#)

Accounting Technician
City of Springfield

Newsletter/Communications

[Greg Drake, CGFM](#)

Senior Accountant
The Arc of the Ozarks

Accountability

[Brandie Fisher, CGFM](#)

Transit Grants Analyst
City Utilities

Professional Certification

[Monica Robinson, CGFM](#)

Finance Director
City of Marshfield

Education Co-Chair

[Renee Vines, CPA](#)

Senior Internal Auditor
City Utilities—Springfield

Education Co-Chair

[Jennifer Schatzer, CPA](#)

Audit Manager
KPM CPAs

Early Career

[Julie Ravenscraft, CPA](#)

Accounting Instructor
Missouri State University

Community Service

[Shari Wyly, CGFM](#)

Chief Financial Officer
United Way of the Ozarks

Webmaster

[Teresa Allen, CGFM](#)

Financial Analyst
City of Springfield

If you have any suggestions for topics for educational events, please let us know! We want to hear from you!

Ozarks Chapter of AGA

2019 Spring Professional Development Training

Date: Thursday, March 28, 2019
Location: White River Conference Center
600 W Sunshine, Springfield, MO 65807
Time: 7:30-8:00 registration and continental breakfast
Conference: 8:00-4:30 lunch included with full day registration

Seminar Agenda (8 hours of CPE):

3 Steps to Perfect Presentations: Dale Moore, Professor of Media, Journalism and Film at MSU, will present on tips and tricks to improve your presentation skills that you can start using immediately.

Public Investment Policy: Bruce Ring, Director of Investments Missouri State Treasurer's Office, will present on current investment policies/regulations for public entities.

Professional Resiliency and Leadership Development

2018 Economic Outlook: Steve Wyett, SVP, Chief Investment Strategist, Private Wealth with BOK Financial, will bring us the 2019 Economic Outlook

Innovation Tournament: Health Alloway and Maureen Birchler, of BKD, will moderate an interactive tournament to help answer the question, "How can your organization best leverage data to impact growth?" This highly interactive session will provide a fun way to collect a large number of new ideas on how to incorporate data into decision making.

Ethics: This presentation will cover the two hour ethics requirement and will be presented by Katlin Cundiff, Management professor at Drury University. (2 hours)

4:20 - 4:30 Closing Remarks

Draft schedule, subject to change.



REGISTRATION FORM

Contact Information:

- **First Name:**
- **Last Name:**
- **Title:**
- **Organization:**
- **Email:**
- **Address:**
- **Phone:**

Registration Fees:

\$200.00 – Registration fee includes your AGA membership dues for 2019

\$30.00 – CGFM Renewal Fee (if applicable)

I would like to be on the AGA monthly newsletter email list.

Amount Due \$ _____ **Date** _____

Remit Information:

Please make checks payable to:

Ozarks Chapter AGA

PO Box 5212

Springfield, MO 65801

Please email your registration to Tammy Beeman **by Friday, March 22nd**:

Email: tbeeman@springfieldmo.gov

Or call if you have any questions: **417-864-1631**

Advance registration is required; cancellations must be received by March 15th to receive a refund.

The Association of Government Accountants

AGA serves professionals in the government financial management community by providing quality education, fostering professional development and certification, and supporting standards and research to advance governmental accountability.