

President's Message

AGA President Message for January 2022

It's 2022, can you believe it? Did anyone make a New Year's resolution? If you're like me, there are lots of things to start and, of course, lots of things to stop. C'est la vie! As we start this new year, I wanted to remind each of you of the great networking, training and leadership opportunities offered by our Chapter. Have you considered a Chapter leadership role? There's no better way get involved with your AGA community. You can reach out to any Chapter Officer for details.

Thank you to everyone for making our Chapter's efforts to help KARM a success! At our December meeting, Burt Rosen, President and CEO of KARM, shared his incredible personal testimony along with information concerning the need in our Knoxville area community. In addition to our Chapter's \$1,000 gift to KARM, we were able to exceed our match goal of \$1,500. Thank you for your generosity!

This month we will be hosting Nathan Woods, CFP, and Sam Paganelli, CFA, from Rather & Kittrell. Their presentation will include: charitable contribution strategies, behavioral finance of individual investors, and we'll learn about the history of RK. Both Nathan and Sam have a variety of experience working with businesses, families, and individuals.

We hope to see you at Calhoun's this month. Friends are welcome to come along!

Happy New Year!

Travis Lowe, AGA East Tennessee President

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January 2022 Meeting

**Tuesday,
Jan. 11, 2022
11:30 AM**



***Nathan Woods, CFP
Sam Paganelli, CFA
Rather & Kittrell***



Agenda

11:30 Registration/Networking
11:30 – 12:10 Lunch
12:10 – 1:00 Presentation

Calhoun's on the River

401 Neyland Drive
865-673-3399

Menu

Roasted Bar-B-Que Chicken on the bone
Bar-B-Que Pork with buns
Cole Slaw & Potato Salad
Smoky Mountain Baked Beans
Biscuits & Corn Muffins
Chocolate Chip Cookies

Cost

**\$10.00 (member)
\$15.00 (non-member)**

Please contact Patti Rebholz
to make your reservation by
Friday, Jan. 7, 2022

AGA National News

AGA Web Conferences: CPE Simplified

Looking for a way to stretch your training budget? AGA Web Conferences make earning CPE hours easy and affordable. Web conferences feature experts on a variety of government financial management and performance topics. Each event includes time for participants to ask questions and receive answers from the presenters. The web conferences are held on **Wednesdays from 2–3:50 p.m. ET, cost \$59.**

Upcoming Web Conferences

Jan 12	Uniform Guidance	2 CPE
Feb 2	GASB Update	2 CPE
Mar 2	Improper Payments	2 CPE

Recruit a Member

Did you know that a large percentage of new members join AGA simply because someone invited them?

As a valued member, you can impact the future of AGA by sharing your experience with your peers, your staff and others in your organization with an interest in government financial management. No one knows better than a current AGA member how beneficial membership is to advancing government accountability.

There are recognition and rewards for recruiting such as sponsor lapel pin for one or more new members, special recognition in AGA publications and at AGA events. You could even become the next recruiter of the year by recruiting the most new members from April 1st thru March 31st of any given year.

21-22 National Events Calendar

Feb. 23-24, 2022	National Leadership Training	14-CPE Hybrid Wash DC
Jul. 17-20, 2022	PDT-Professional Development Training	24-CPE Anaheim or Virtual
Sep. 20-21, 2022	Internal Control & Fraud Prevention Training	14-CPE Washington DC

Chapter News

December's Secretary Report

Our December meeting of the East TN AGA Chapter was held on December 14, 2021, at Calhoun's on the River. President Travis Lowe opened the meeting and invited everyone to enjoy their delicious lunch. Thaddeaus Grace then introduced the speaker, Burt Rosen, President and CEO of KARM.

Burt Rosen began his presentation with a history of how he came to be at KARM. He then followed with description of their various programs and all the ways they service the community. Burt was presented with a check of \$1,000 from the Chapter. Travis thanked Burt Rosen for his informative presentation and reminder to members of our matching pledge of \$1,500. Instruction on how to give as well as a hope to exceed our matching pledge goal.

A short board meeting was held afterwards. A discussion of future meeting speakers and vacancies for president-elect on the board.

Deb Strahler for Karen McGee, Secretary

FINANCIAL INFORMATION



Treasurer Connie Cook reported the bank balance as of January 1, 2022 as \$ 15,044.84.

East Tennessee AGA Chapter Officers 2021-2022

President:	Travis Lowe
Past President:	Astra Cope
Webmaster:	Emily Strange
Treasurer:	Connie Cook
Secretary:	Karen McKee
Historian:	Amy Paganelli
Membership:	Robin Shelton
Education:	Dennis Green
CGFM:	Deb Strahler
	Mary McDonald
Awards:	Ginger Giffin
Accountability:	Gary Mitchell
Community Service:	Thaddeus Grace
Early Careers:	Nicholas Fitts
Newsletter Editor:	Deb Strahler
Research:	Larry Elmore
Chapter Recognition:	Mary McDonald
Meetings:	Patti Rebholz
Social Media:	Chandni Dularam
President - Elect:	

EAST TENNESSEE CHAPTER OFFICER OPPORTUNITIES

There is always an opportunity for anyone of you to take a position as a board member.

Chapter Member Promotions

- \$250 to Member passing the CGFM
- Bring a first time guest to a Chapter Meeting and both member and guest eat free

January Speakers

Rather & Kittrell

Nathan Wood, CFP, AIR, Sr. Advisor

Nathan is a Senior Advisor with Rather & Kittrell where he works with businesses, families, and individuals to implement, coordinate, and achieve their financial goals. He began with the company in 2020 as an Advisor.

Nathan received a Master's in Business Administration and undergraduate degrees in Finance and Accounting from the University of Tennessee at Martin. He is also a CERTIFIED FINANCIAL PLANNER™ professional and Accredited Investment Fiduciary™. Nathan is active in his community and serves on boards of the Great Smoky Mountain Council – Boy Scouts of America, The First Tee of Greater Knoxville, Volunteer East Tennessee, and Cancer Support Community of East Tennessee.

Sam Paganelli, CFA, Assoc. Advisor

Sam is a CFA charterholder and Associate Advisor at Rather & Kittrell. He graduated from the University of Tennessee with an accounting degree in 2018. During his time at UT, Sam was a member of the Global Leadership Scholars program and the Chancellor's Honors Program. Sam spent three years in finance at Tennessee Valley Authority (TVA) before transitioning to Rather & Kittrell in June 2021.

Sam graduated from Maryville High School and has lived in Maryville his whole life. His wife Claire, is a CPA and tax accountant. Sam enjoys chess, basketball, improving at golf, watching football, and spending time with his wife outside of work.

BECOME A CGFM TODAY!!!

The Certified Government Financial Manager - The Mark of Excellence in Federal, State and Local Government.

Since its inception in 1994, the CGFM has become the standard by which government financial management professionals are measured. Its education, experience and ethics requirements have served to elevate the most seasoned financial professionals. More than 14,000 individuals have received the designation so far. Now it's your turn. Experience the benefits of certification first hand—the CGFM is the mark of excellence in your profession. We look forward to adding your name to our distinguished list of Certified Government Financial Managers.

Recent research has shown that employers attribute their recruiting difficulties to a shortage of qualified professionals. Give yourself a competitive advantage by showing your commitment to lifelong learning. You need a credential that shows you are qualified and have the skills to lead. The Certified Government Financial Manager (CGFM) does this like no other credential.

The CGFM is the first certification broad enough to cover the whole field of government financial management—federal, state and local. It measures a wide range of knowledge and skills that a professional needs to succeed in the federal government financial environment, or to meet the unique challenges faced by state and local government financial managers

Learn more about how to become a CGFM at <http://www.agacgfm.org/cgfm/whyearn/default.aspx>.

CGFM Exam Preparation Courses

What:	Course 1	Course 2	Course 3
Where:	Virtual, live	Virtual, live	Virtual, live
When:	Jan. 13-14, 2022	Jan. 25-28, 2022	Feb. 8-10, 2022
	10:30am – 2:30pm each day	10:30am – 3:30pm each day	10:30am – 3:30pm each day
Cost:	\$325 per person	\$725 per person	\$525 per person
Deadline:	1/6/22	1/18/22	2/1/22

CGFM Self-Study Alternatives

Study Guides offers by AGA: Course 1 \$95, Course 2 \$115 and Course 3 \$105

Another option is online self-paced training: Course 1 - \$225

Course 2 - \$625

Course 3 - \$425