



SOUTHERN
WISCONSIN
CHAPTER



Monthly Footnotes

JANUARY 2019

Welcome Members/Non-Members

Thursday, January 24 Lunch Meeting

TOPIC: Annual Tax Update

**SPEAKER: Bart Halderson, Senior
Manager, Tax, BDO**

REGISTRATION: 11:30 a.m.

LUNCH: 11:45 a.m.

COST: \$6 for Members, \$12 for Non-Members

**PLACE: Babe's Restaurant, 5614 Schroeder
Road, Madison, Wisconsin 53711**

**MENU: Meals served with house cut pub fries and
include soda, coffee, or tea.**

- Cheeseburger with cheddar cheese
- Caprese Chicken Sandwich – grilled chicken breast, tomato, fresh mozzarella, pesto mayo, balsamic reduction, toasted ciabatta
- Club Sandwich – three layers of whole wheat toast with ham, turkey, bacon, lettuce, tomato, and mayo

RESERVATIONS: Contact Sherri Voigt **by 9 a.m. on Tuesday, January 22, 2019** with your name, membership status, meal choice (and for carpooling information) at (608) 576-6473 or sherri-aga@hotmail.com.

Register on-line at www.aga-wis.org

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NEW MEMBERS FIRST LUNCH MEETING IS FREE!

If you are a new member and you are attending your first luncheon, it's **FREE!** Please note this when making reservation.

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ABOUT THIS MONTH'S SPEAKER

EXPERIENCE

Bart is a Tax Senior Manager for BDO Wisconsin with more than twenty years of public accounting experience, serving both the Milwaukee and Madison offices. In his role, Bart utilizes his knowledge serving clients in tax compliance and planning work for corporations, partnerships, not-for-profits and individual taxpayers. His client base is predominantly in manufacturing, high tech and life sciences and have multistate and international complexities.

In addition to traditional compliance work, Bart completes a number of functions including representation of taxpayers before the federal and state government agencies of taxation; aiding companies during the initial start-up process; and working with State and local assessing agencies to help minimize personal property and real estate tax.

PROFESSIONAL AFFILIATIONS

American Institute of Certified Public Accountants
Wisconsin Institute of Certified Public Accountants

EDUCATION

B.B.A., Accounting, University of Wisconsin-Madison



Wednesday, February 6 Webinar

February 6 | 1–2:50 p.m. | 2 CPE

Topic: GASB Update

Program Level: Overview

Prerequisite: None

Advance Preparation: None Required

Field of Study: Accounting (ACCG)

This webinar will highlight recently issued standards, due process documents, and recent GASB activities on the following topics:

- Leases
- Financial reporting model and conceptual framework
- Revenue and expense recognition
- Public private partnerships
- Note disclosures
- Conduit debt
- Subscription-based information technology arrangements
- Fiduciary activities

Speakers

- David Vaudt, Chairman, GASB
- David Bean, Director of Research and Technical Activities, GASB
- Lisa Parker, Senior Project Manager, GASB
- Roberta Reese, Senior Project Manager, GASB
- Scott Reeser, Supervising Project Manager, GASB

REGISTRATION: 12:30 p.m. - Webinar 1:00 p.m.

COST: Free for Members, \$10 for Non-Members

PLACE: UWSA Service Center, 660 West Washington Ave

Register on-line at www.aga-wis.org or by e-mail (sherri-aga@hotmail.com) by 1 pm on Monday, February 4, 2019.

Note: The AGA Chapter signs up for a single-site group webinar license. We can only award CPE for on-site attendance.

PRESIDENT'S MESSAGE

Sherri Voigt, CGFM, CPA

Welcome to winter!

We have two training events coming up. January 24 is the Annual Tax Update Luncheon. On February 6 we are hosting the AGA national webinar on GASB updates.

We are in the final stages of getting the May 8 Annual Symposium schedule finalized. We plan to send out the final brochure at the beginning of February.
****save the date****

As always, if you have any topic or speaker suggestions, feel free to send them to Education Chair Mary Laufenberg at maryendres6998@gmail.com.

Sherri



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Chapter News



2018 – 2019 Chapter Board Members (left to right): David Mellem, Mary Laufenberg, Roger Birkett, Lillian Radivojevich, Sherri Voigt

Salvation Army Donations

The Salvation Army greatly needs the following items:

- Bath Towels
- Diapers - All Sizes
- Baby Bottles
- Sanitary Items

Items will be collected at luncheon meetings.

The AGA Southern Chapter continues to support the Salvation Army Shelter and Community Center. Thank you AGA members and non-members for all of your wonderful support, it is greatly appreciated.

ARE YOU MOVING?

Please notify both your chapter and AGA National of your address change. Update your address online at the national website in the members' only area: www.agacgfm.org

SHARE YOUR NEWS

Please submit an article to the Newsletter Editor at radivojevich@danesherriff.com
Deadline for submission of articles is the 25th of the month.

If you ever come up with a topic or speaker you think the local AGA chapter should offer, let us know!!! We are always looking for ideas. (contact Mary Laufenberg, Education Chair, at maryendres6998@gmail.com)

Over the past couple of months, we were contacted with great some ideas. If we are able to locate a presenter, we will be offering some additional training over the winter. Keep watching our calendar of events for changes!

Calendar of Events 2018 – 2019

October 2018 – Board Meeting, to be determined
October 2018 – No Luncheon Meeting

November 6 2018 – Board Meeting
November 1, 2018 – Luncheon Meeting, Speaker: Cory Fish, Director of Tax, Transportation and Legal Affairs, Topic: Collecting Sales Tax from Online Retailers
November 28, 2018 – Webinar, Presenter Kevin McCarthy Inspirational Speaker, Best-Selling Author, BlindSpots, LLC, Topic: Ethics

December 2018 – No Board Meeting
December 5, 2018 – Webinar, Presenters Mike Wetklow, CGFM, CPA, Deputy Chief Financial Officer and Division Director, NSF and Mark A. Krieger, CPA, Director, Office of Finance, USPTO, Topic: Internal Control

January 8, 2019 – Board Meeting

January 24, 2019 – Luncheon Meeting, Annual Tax Update, Bart Halderson, Senior Manager, Tax, BDO, Location: Babe’s Restaurant and Grill

February 5, 2019 – Board Meeting, to be determined
February 6, 2019 – Webinar, Topic: GASB Update
February 28, 2019 – Luncheon Meeting, topic and location to be determined

March 5, 2019 – Board Meeting, to be determined
March 28, 2019 – Luncheon Meeting, Topic: Ice Age Trail Joint Partnership—Funding and Operations; Speaker and location to be determined

April 2, 2019 – Board Meeting, to be determined
April 10, 2019 – Webinar: Ethics

May 5, 2019 – Community Service Event – MS Walk – date and location to be determined
May 7, 2019 – Board Meeting, to be determined
May 8, 2019 – Annual Spring Symposium, UW-Madison Union South
June 2019 – Board Meeting, to be determined

Note: Community service, VITA, and social events will be announced during the year.

*** subject to change as more detailed topic information becomes available***



SOUTHERN WISCONSIN CHAPTER

Officers and Directors 2018 – 2019

President – Sherri Voigt, CGFM, CPA, UWSA, sherri-aga@hotmail.com, 608-576-6473

President Elect – Vacant

Immediate Past President – Mary Laufenberg, CGFM, CPA,
maryendres6998@gmail.com, 608-438-8338

Treasurer – Roger Birkett, CPA, jabirk100@yahoo.com

Historian – David Mellem, CGFM, CIA, CISA, US DHHS OIG, djmellem@outlook.com,
608-264-5415 extension 25

Membership Chair – David Mellem, CGFM, CIA, CISA, US DHHS OIG,
djmellem@outlook.com, 608-264-5415 extension 25

Newsletter Editor – Lillian Radivojevich, radivojevich@danesherriff.com, 608-284-4801

Education Chair – Mary Laufenberg, CGFM, CPA, maryendres6998@gmail.com, 608-438-8338

Awards Chair – Vacant

Accountability Outreach Chair – Sherri Voigt, CGFM, CPA, UWSA, sherri-aga@hotmail.com, 608-576-6473

Webmaster – Scott Thornton, sbthornton@gmail.com

Community Service Chair – To be announced

CGFM Chair – To be announced

Directors

- Roger Birkett, CPA, jabirk100@yahoo.com
- Lillian Radivojevich, radivojevich@danesherriff.com, 608-284-4801

Chapter Website – www.aga-wis.org

Chapter Address – PO Box 1454; Madison, WI 53701-1454