



SOUTHERN  
WISCONSIN  
CHAPTER



# Monthly Footnotes

## JANUARY 2020

### Welcome Members & Non-Members



Wednesday, January 8  
Audio Conference

1:00–2:50 P.M. | 2 CPEs

**TOPIC:** Uniform Guidance

**SPEAKERS:** Bert Nuehring, CPA  
Nicole Waldeck, PMP

**REGISTRATION:** 12:45 p.m.

**COST:** Attendance is free to the first  
30 people who register.

**PLACE:** State Education Building, General  
Executive Facility 3 (GEF 3)  
125 South Webster Street  
Madison, Wisconsin 53703-3474  
Rm P41 (ground floor).

Register on-line at [www.aga-wis.org](http://www.aga-wis.org) or e-mail  
([sherri-aga@hotmail.com](mailto:sherri-aga@hotmail.com)) by 1 pm on  
Tuesday, January 7, 2020.

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

### Inside This Issue:

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**NEW MEMBERS  
FIRST LUNCHEON MEETING  
IS FREE!**

## ABOUT THIS MONTH'S AUDIO CONFERENCE & SPEAKER BIOS

During this webinar, we will be discussing some of the challenges and best practices of Uniform Guidance since its implementation days. What are some of the most common challenges local, state, feds and/or NGOs are facing when implementing Uniform Guidance. While the intent was to streamline administrative and improve “performance, transparency, and oversight for Federal Awards,” some areas remain for many organizations receiving federal funding to overcome, i.e. administrative burden, contractor vs. sub-recipient relationship, determining portion of federal funding, etc

### **Bert Nuehring, CPA** Partner, Crowe

Mr. Nuehring is a partner with the public accounting, consulting and technology firm of Crowe LLP. Mr. Nuehring has been in the public accounting profession for over 30 years and has been responsible for planning, administering and supervising audit, accounting and consulting service engagements for governmental, education and not-for-profit entities. Mr. Nuehring has extensive experience with Uniform Grant Guidance compliance, compliance auditing, performance auditing, internal auditing, Enterprise Risk Management, internal controls, federal grant administration, and standards implementation. Mr. Nuehring holds a Bachelor of Arts in Accounting and Business Administration from Wartburg College and is a certified public accountant and chartered global management accountant.

### Nicole Waldeck, PMP (Invited) Senior Policy Analyst, OMB

Nicole Waldeck is a Policy Analyst with the Office of Management and Budget (OMB), Office of Federal Financial Management (OFFM). In this role, Nicole collaborates to provide government-wide policy on the award, administration, and management of Federal financial assistance. She leads government-wide initiatives to improve Federal financial assistance policies, processes, and systems while engaging with Government and non-Federal stakeholders on key issues. Nicole is the OMB lead for the Performance Management Work Group for the Results-Oriented Accountability Cross-Agency Priority Goal for the President's Management Agenda. Nicole is currently pursuing her Master of Public Policy Degree at George Mason University and has a Bachelor of Science Degree in Finance from the University of Central Florida. She is also a certified Project Management Professional (PMP). Nicole lives in Arlington, Virginia with her husband and dog Wrigley.

# January 24 Luncheon Meeting

**TOPIC:** Annual Tax Update: Tax Year 2019

**SPEAKER:** Tara Guler, CPA, MST

**DATE:** Thursday, January 23, 2020

**REGISTRATION:** 11:30 a.m. **LUNCH:** 11:45 a.m.

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

**PLACE:** Vintage Brewing Company  
2674 S Whitney Way; Madison, Wisconsin 53711

**MENU:** Meals served with sides as noted and beverage (soda, coffee, and tea)

- Cheeseburger with fries
- Turkey Panini Melt with fries (Turkey, cheddar, bacon, lettuce, tomato, and avocado aioli pressed in sourdough bread)
- Margherita Flatbread (Pesto aioli, heirloom tomato, house-made fresh mozzarella, and fresh basil. Finished with pine nuts and a balsamic drizzle)

**RESERVATIONS:** Contact Sherri Voigt by 11 a.m. on Monday, January 20, 2020 with your name and membership status and for carpooling information at (608) 576-6473 or [sherri-aga@hotmail.com](mailto:sherri-aga@hotmail.com).

Register on-line at [www.aga-wis.org](http://www.aga-wis.org)

## Member Benefit

**Members can bring their supervisor to one lunch meeting a year for free!**

**This is our thank you to them for supporting member activity and training.**

## ABOUT THIS MONTH'S LUNCHEON SPEAKER

# Tara Guler, CPA, MST

Tara Guler is a senior manager for the manufacturing and distribution team with Baker Tilly.



**Baker Tilly Virchow Krause, LLP Senior Manager**

10 Terrace Ct., Madison, WI 53707, United States

**T +1 (608) 240 6714 [tara.guler@bakertilly.com](mailto:tara.guler@bakertilly.com)**  
bakertilly.com

### **Education**

Masters of Science in Taxation

DePaul University (Chicago, Illinois)

Bachelor of Business Administration in Accounting

University of Wisconsin–Madison

Prior to joining Baker Tilly, Tara worked for a Big Four firm specializing in federal taxation. She specializes in providing tax and consulting services to manufacturing and distribution companies, with a focus on cooperatives, corporate businesses, tax compliance, accounting for income taxes, tax planning and tax department outsourcing.

### **Specific experience**

- Reviews various federal and state tax income tax returns for large corporations
- Provides consulting services to cooperatives regarding tax planning ideas to benefit both cooperatives and their members
- Participates on the NSAC tax committee, which includes presenting at local chapter and national conferences
- Provides consulting and tax planning services for businesses and owners
- General federal consulting services for public and privately held companies

### **Industry involvement**

- American Institute of Certified Public Accountants (AICPA)
- National Society of Accountants for Cooperatives (NSAC)
- National Council of Farmer Cooperatives (NCFC)
- Wisconsin Institute of Certified Public Accountants (WICPA)

**PRESIDENT'S MESSAGE**  
**Sherri Voigt, CGFM, CPA**

We have two training opportunities in January. I look forward to seeing you out there...

The annual tax update is always interesting; feel free to share with friends and family.

We are in the final planning stages for the May Symposium. There are only a couple time slots left to fill. If you have any ideas of topics or speakers, please feel free to send the "tips" to Education Chair Mary Laufenberg at [maryendres6998@gmail.com](mailto:maryendres6998@gmail.com). Even if it is just a partial idea, she can often locate a speaker to handle the subject area.

*Sherri*



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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.

## Chapter News



**2019 – 2020 Chapter Board Members**  
**(left to right):** David Mellem (deceased),  
Mary Laufenberg, Roger Birkett, Lillian  
Radivojevich, and 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.

## **National News**

## Season of Giving: Make a Difference in the Future of Our Field

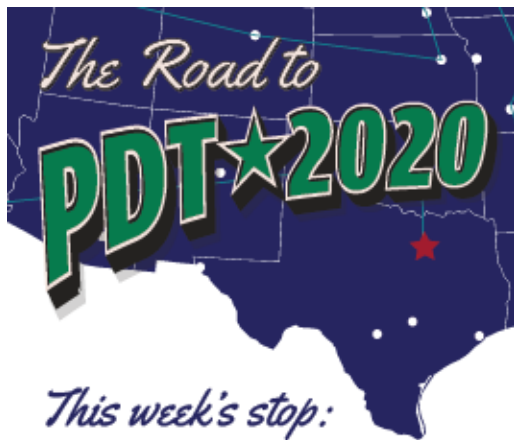
AGA's programs, resources and ethics guidance provide the insights, skills and knowledge needed in the workforce of the future. In order to help fund our upcoming initiatives, we're aiming to raise \$10,000 by the end of 2019. Your *tax-deductible* gift will help us reach our goal and make a positive impact on the future.

[how far can your donation go?](#)

## Limited Space – CGFM Intensive Review Course

Join us Jan. 30–31, 2020, in Alexandria, Va., for the next CGFM Intensive Review Course (IRC). Attendees will review the material with a CGFM instructor over the two days and receive three FREE exam vouchers — up to a \$375 savings!

[learn more](#)



*This week's stop:*

### **Northern Virginia**

The Oyster Capital of the East Coast is also home to our second largest chapter. Coincidence?

## 25 REASONS to be a CGFM

*Reason #23*

Achieve personal satisfaction

25 YEARS  
★CGFM.

### **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](http://www.agacgfm.org)

### **SHARE YOUR NEWS**

Please submit an article to the Newsletter Editor at [radiojevich@danesherriff.com](mailto:radiojevich@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](mailto:maryendres6998@gmail.com))

Over the past couple of months, we were contacted with some great 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 2019 – 2020

September 24, 2019 Board Meeting

October 24, 2019 – Luncheon Meeting

October 30, 2019 – Board Meeting

November 12, 2019 – Board Meeting

November 20, 2019 – Audio Conference Ethics, location to be determined

December 11, 2019 – Board Meeting

December 11, 2019 - Audio Conference Internal Control, location State Education Building, General Executive Facility 3 (GEF 3)

**January 8, 2020 – Audio Conference, Uniform Guidance, State Education Building, General Executive Facility 3 (GEF 3)**

**January 14, 2020 – Board Meeting**

**January 23, 2020 – Luncheon Meeting, Tax Update 2019, speaker Tara Guler, CPA, MST, location The Egg and I Restaurant, 2501 West Beltline Highway, 53713**

February 5, 2020 – Audio Conference GASB Update, location to be determined

February 11, 2020 – Board Meeting

March 10, 2020 – Board Meeting

March 26, 2020 – Luncheon Meeting, topic and location to be determined, March declared as CGFM month

April 8, 2020 – Audio Conference Ethics, location to be determined

April 14, 2020 – Board Meeting

May 12, 2020 – Board Meeting

May 2020 – Annual Spring Symposium, UW-Madison Union South

June 9, 2020 – Board Meeting

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

*\*\* Dates, topics, and locations subject to change as more detailed information becomes available. \*\**

## Officers and Directors 2019 – 2020

**President** – Sherri Voigt, CGFM, CPA, UW System, [sherri-aga@hotmail.com](mailto:sherri-aga@hotmail.com), 608-576-6473

**President Elect** – Vacant

**Immediate Past President** – Mary Laufenberg, CGFM, CPA, [maryendres6998@gmail.com](mailto:maryendres6998@gmail.com), 608-438-9375

**Treasurer** – Roger Birkett, CPA, [jabirk100@yahoo.com](mailto:jabirk100@yahoo.com)

**Historian** – Vacant

**Membership Chair** – Vacant

**Newsletter Editor** – Lillian Radivojevich, [radivojevich@danesherriff.com](mailto:radivojevich@danesherriff.com), 608-284-4801

**Education Chair** – Mary Laufenberg, CGFM, CPA, [maryendres6998@gmail.com](mailto:maryendres6998@gmail.com), 608-438-9375

**Awards Chair** – Vacant

**Accountability Outreach Chair** – Sherri Voigt, CGFM, CPA, UW System, [sherri-aga@hotmail.com](mailto:sherri-aga@hotmail.com), 608-576-6473

**Webmaster** – Scott Thornton, [sbthornton@gmail.com](mailto:sbthornton@gmail.com)

**Community Service Chair** – To be announced

**CGFM Chair** – To be announced

**NCC Representative** – Andrew Stovich, [astovich@isosat.net](mailto:astovich@isosat.net)

### Directors

- Roger Birkett, CPA, [jabirk100@yahoo.com](mailto:jabirk100@yahoo.com)
  - Lillian Radivojevich, [radivojevich@danesherriff.com](mailto:radivojevich@danesherriff.com), 608-284-4801
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**Chapter Website** – [www.aga-wis.org](http://www.aga-wis.org)

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