

Southern Wisconsin AGA presents

45th Annual Spring Symposium

Professional Development Training

May 10, 2023 | 8:00am-3:50pm | In Person | 7.0 CPEs

Topics Include:

- Accountability in the Workplace
 - GASB Updates and Impacts
- Pensions and the Current State of the Economy
- Effective Risk Assessment and Audit Planning
 - Common Errors in Governmental Reporting
 - Cybersecurity Risks and Controls

AGA Member \$50 | Non-Member \$100 |

Retired AGA Members \$30

Prerequisites:	None
Advanced Preparation:	None Required
Delivery Method:	In Person
Program Level:	Overview

Questions? Special dietary needs? Please email or call:
Sherri Voigt: sherri-aga@hotmail.com or 608-264-8492/608-576-6473

Registration & Payment
Register on-line at www.aga-wis.org or contact
Sherri Voigt: sherri-aga@hotmail.com or 608-576-6473

REGISTRATION FORM:

- \$ 50.00 AGA Member
- \$ 30.00 Retired AGA Member
- \$100.00 Non-Member

Name: _____

Employer: _____

Address: _____

City: _____ State: _____ Zip: _____

Email Address: _____

**** Registration deadline is April 25, 2023****

After the registration deadline, there are no cancellations, only substitutions.

Register online at www.aga-wis.org.

If you have multiple people to register for your agency, you may send one list via email for all names. Please include name, e-mail address, member status, and indicate if you would like an invoice sent.

Payment Information (to be included with your registration form if mailing in):

- **Payment by Check**

Make checks payable to AGA and send to the following address:

**Southern WI AGA
PO Box 1454
Madison, WI 53701-1454**

If you would like an invoice to facilitate payment processing, please note that in the on-line registration or in e-mail registration

- **Payment by Credit Card**

Provide your registration information at www.aga-wis.org or by email to Sherri Voigt at sherri-aga@hotmail.com. Please indicate that you want an invoice created to pay by credit card and AGA will send a PayPal invoice which can be paid online.



**SOUTHERN WISCONSIN
CHAPTER**

Symposium Agenda

Start Time	End Time	Session Topic	Session Speaker
7:45 AM	8:00 AM	Sign In	
8:00 AM	8:05 AM	Opening Remarks	Sherri Voigt, CGFM, Southern WI AGA Chapter President
8:05 AM	8:55 AM	Accountability in the Workplace	Jim Kreiser & Mike Anderson, CliftonLarsonAllen
8:55 AM	9:10 AM	Break	
9:10 AM	10:00 AM	GASB Updates and Impacts	Jake Lenell, CliftonLarsonAllen
10:00 AM	10:15 AM	Break	
10:15 AM	11:30 AM	Pensions and the Current State of the Economy	Jordan Boehm, CliftonLarsonAllen
11:30 AM	12:20 PM	Lunch	
12:20 PM	1:10 PM	Effective Risk Assessment and Audit Planning	Jim Kreiser (team), CliftonLarsonAllen
1:10 PM	1:25 PM	Break	
1:25 PM	2:15 PM	Common Errors in Governmental Reporting	Jake Lenell, CliftonLarsonAllen
2:15 PM	2:30 PM	Break	
2:30 PM	3:45 PM	Cybersecurity Risks and Controls	Jim Kreiser (team), CliftonLarsonAllen
3:45 PM	3:50 PM	Closing Remarks	Sherri Voigt, CGFM, Southern WI AGA Chapter President

Titles and times/speaker order are subject to change

Location Information:

The training event will be held at the UW-Madison Union South located at 1308 West Dayton Street, marked by the sun ☀ and red circle on the below map. Parking under the building (Lot 80) is **extremely** limited and costs \$2 for each of the first three hours and \$1 for each additional hour (4 hours=\$7.)

The next closest parking ramp is located at Lot 17 on Engineering Drive, across Randall Avenue (red arrow). Rates are based on a daily maximum fee of \$12.



Car pooling and public transportation are strongly encouraged.

We recommend that you dress in layers and bring a sweater or jacket to the conference in case the room temperature is not comfortable for you. There is limited control over the temperature in the meeting room.

Session Information

Accountability in the Workplace

This leadership session includes:

- Traits to foster accountability
- How to build an accountable culture throughout the organization

GASB Updates and Impacts

Topics include:

- GASB 87--Leases
- GASB 94--Public-Private and Public-Public Partnerships and Availability Payment Arrangements
- GASB 96--Subscription-Based Information Technology Arrangements
- A brief review of "Upcoming Items":
 - GASB 89--Accounting for Interest Cost Incurred Before the End of a Construction Period
 - GASB 91--Conduit Debt Obligations
 - GASB 92--Omnibus 2020
 - GASB 97--Component Unit Criteria, Accounting & Financial Reporting for Deferred Compensation Plans
 - GASB 100--Accounting Changes and Error Corrections-An Amendment of GASB Statement No 62
 - GASB 101--Compensated Absences

Pensions and the Current State of the Economy

This session will cover how pensions help the economies for local communities and businesses. You will learn how pension plans have been affected by the economy and what the various pensions plans across the nation are encountering for market conditions in the past year. Lastly, we will address what the overall economy has done to state budgets and revenues and what impacts and responses we are seeing from government entities to address the effect on pensions.

Effective Risk Assessment and Audit Planning

Covers these learning objectives:

1. Discuss trends and the intersection of risk assessment, risk management, compliance management, fraud risk, and internal audit
2. Identify factors driving the need for Risk Assessment and alignment with audit procedures
3. Recognize key items and leading practices for building a robust, mature, and effective risk assessment
4. Assess methods for leveraging and incorporating risk assessments and risk management practices into effective and detailed audit plans

Common Errors in Governmental Reporting

A review of errors found in governmental reporting; additional session content coming soon

Cybersecurity Risks and Controls

Session detail coming soon

Speaker Biographies

Jim Kreiser is a Principal with the Specialty Advisory Services/Business Risk Services group of CliftonLarsonAllen in the Philadelphia office. Jim specializes in advisory services for governmental health care clients, and helps lead CLA services regionally and nationally regarding internal audit, risk management, SOC reporting, and related consulting and third party reporting services. Jim's experience includes significant internal audit experience, including serving as the Vice President of Risk Management and Chief Risk Officer for Capital BlueCross, as well as prior internal audit and Big 4 experience.

His educational background is Bachelor of Science, Managerial Economics and Philosophy, Carnegie Mellon University

Mike Anderson, CPA, Manager, CLA Milwaukee (Wauwatosa), is part of CliftonLarsonAllen's Regulated Industries Group, with a primary focus on serving nonprofit organizations and clients who report under the GASB standards. He specializes in providing accounting, auditing, and consulting services.

Michael received his Bachelor of Business Administration in accounting and finance from Wisconsin Lutheran College.

Jake Lenell, Principal, CLA Milwaukee (Wauwatosa). Jake is an audit principal serving public sector clients since 2002. His experience includes consulting on government and nonprofit accounting standards, presenting financial information to governing boards, and preparing financial statements in conformity with accounting standards and ACFR award criteria. He has performed internal inspections and peer review of other firms.

Jake has an MBA from Lakeland University and a BA from Cardinal Stritch University. He is a member of AICPA, WICPA, GFOA, and WGFOA. He is the board treasurer for BC Junior Lancers Basketball, Inc.

Jordan Boehm, Principal, CLA Milwaukee. As a member of CLAs Regulated Industries team, Jordan's focus is on providing attestation and consulting services to our State and Local Government and Higher Education clients. His team focuses on delivering our services seamlessly through industry specialization. Their services include audit, custom accounting solutions, outsourced accounting, policy and procedure review, finance department assessment, among many others.

Jordan received his Bachelor of Business Administration in accounting and finance from the University of Wisconsin, Milwaukee. He is a member of AICPA, WICPA, WGFOA, and GFOA.

This year we are partnering with CLA to provide speakers. We appreciate their assistance with providing a range of accountability topics.



CLIFTONLARSONALLEN

Helping you is our passion.

CLA is committed to creating opportunities for our clients, our people, and our communities. We're one family, working together, to provide those opportunities.

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- Technology
- Telecommunications