

**AGA Southern Wisconsin Chapter** presents:

# **46th Annual Spring Symposium**

Professional Development Training

**May 8, 2024 | 8:00am-3:30pm | In Person | 6.5 CPEs**

## **Topics Include:**

- Leadership in Financial Management
- How Government Bonding Affects Your Life
  - Enterprise Risk Management (ERM)
  - Emotional Intelligence
- Fraud: Internal Controls and Fraud Risk Management

**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](mailto:sherri-aga@hotmail.com) or 608-576-6473

### **Registration & Payment**

Register on-line at [www.aga-wis.org](http://www.aga-wis.org) or contact  
Sherri Voigt: [sherri-aga@hotmail.com](mailto:sherri-aga@hotmail.com) or 608-576-6473

46th Annual Accounting and Financial Management Conference  
(AGA Southern WI Annual Spring Symposium)

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 23, 2024 \*\***

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

**\*\*SPACE IS LIMITED TO 150 PEOPLE\*\***

**Note:** Fees include continental breakfast, beverage, buffet luncheon, and afternoon refreshments.

Register online at [www.aga-wis.org](http://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](http://www.aga-wis.org) or by email to Sherri Voigt at [sherri-aga@hotmail.com](mailto: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	Sherry Voigt, CGFM, AGA Southern WI Chapter President
8:05 AM	8:55 AM	Leadership Themes in Financial Management (FOS: PD)	Tony Scardino, CrowdStrike, AGA NGB Director At-Large
8:55 AM	9:10 AM	Break	
9:10 AM	10:00 AM	How Government Bonding Affects Your Life (FOS: ECON)	David Erdman, Baker Tilly
10:00 AM	10:15 AM	Break	
10:15 AM	11:30 AM	Enterprise Risk Management (FOS: MGMT)	Bradley Grams, US Department of Transportation Federal Aviation Administration
11:30 AM	12:20 PM	Lunch	
12:20 PM	1:10 PM	Emotional Intelligence: The Importance of Building Strong Relationships (FOS: PD)	Tony Scardino, CrowdStrike, AGA NGB Director at Large
1:10 PM	1:25 PM	Break	
1:25 PM	2:15 PM	Fraud: Internal Controls and Fraud Risk Management (FOS: AUD)	David Miller, KerberRose Amanda Tigert, KerberRose
2:15 PM	2:30 PM	Break	
2:30 PM	3:45 PM	Fraud session continued (FOS: AUD)	David Miller, KerberRose Amanda Tigert, KerberRose
3:45 PM	3:50 PM	Closing Remarks	Sherry Voigt, CGFM, AGA Southern WI 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 \$15.



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

### **Leadership in Financial Management**

Leadership Themes in Government Financial Management

### **How Government Bonding Affects Your Life (FOS: ECON)**

An overview of government debt and how it affects you as a taxpayer/citizen, including different types of public funding and debt instruments.

### **Enterprise Risk Management (FOS: MGMT)**

This session will include an overview of ERM, a discussion of the relationship between ERM and internal controls, some examples of practical application of ERM, and a Q&A session.

### **Emotional Intelligence**

An overview of emotional intelligence and the importance of building strong relationships.

### **Fraud: Internal Controls and Fraud Risk Management (FOS: AUD)**

This session will be an interactive discussion about internal controls and fraud. The speakers will cover how fraud can occur, who might commit fraud, and most importantly, how to prevent or mitigate fraud. Many of the examples relate to state and local government settings.

### **Field of Study (FOS) list**

AUD	Auditing
ECON	Economics-Technical
MGMT	Management Services-Technical
PD	Professional Development

## Speaker Biographies

**Tony Scardino** is Vice President, Internal Audit, at CrowdStrike. Prior to that, he was a Vice President with CGI Federal, where he helped federal agencies solve organizational, financial, and IT challenges. Previous to this position, Tony served as Managing Principal at Grant Thornton, where he led the firm's cadre of former government executives (FGEs) that leveraged its experience and expertise to help agencies work across the C-suite to improve mission outcomes, provide excellent service, and effectively steward taxpayer dollars.

Until July 2019, Tony was the Chief Financial Officer for the United States Patent and Trademark Office (USPTO), serving as principal advisor to the USPTO Director in leading and improving the financial management, accounting, budgeting, fee setting, revenue forecasting, financial systems, and organizational performance of the agency. In this role, Tony oversaw an annual budget that exceeded \$3 billion, supporting almost 13,000 USPTO employees. Tony also spent much of 2017 and 2018 as the agency's Acting Deputy Director. His prior experience includes service as the Budget Director/Acting CFO at the Department of Housing and Urban Development (HUD) and the Budget Director for former agency known as the Broadcasting Board of Governors (BBG).

In recognition of his achievements, Tony has been the recipient of numerous awards and distinctions, including the Meritorious Presidential Rank Award (2014), the Frank Greathouse National Leadership Award from AGA (2017), and American University's Roger W Jones Award for Executive Leadership (2018). In November 2017, Tony was inducted as a lifelong Fellow into the National Academy of Public Administration (NAPA).

Tony is currently a member of the AGA National Governing Board. He serves as a Director At-Large. He is a frequent speaker and moderator at AGA national conferences.

**David Erdman** is a Managing Director for Baker Tilly Municipal Advisors, LLC. He has over 30 years of public finance experience at a major state-level issuer and is an active advocate and leader for municipalities in the municipal bond market. David is a part of the national large issuer team supporting the Midwest.

Registered Municipal Advisor with the Securities and Exchange Commission.

### Experience

- Extensive working relationship with many regulatory agencies along with significant experience with multiple types of credits and transactions
- Experience with ESG matters – both their impact and benefit on issuers – and working on the current federal Infrastructure Bill
- Member of the State of Wisconsin Capital Finance Office from 1994 (director since 2015) until retirement in July 2022
- Led a team responsible for the preparation, sale, issuance, disclosure and compliance of nearly 300 State of Wisconsin bond/notes issues in aggregate par amount of nearly \$50 billion
- Played key role in the sale and issuance of obligations for the Fiserv Forum, Foxconn Development in the Village of Mount Pleasant and expansion of the Wisconsin Center District

- Sold, placed and issued various forms of obligations – bonds, commercial paper notes, auction rate certificates, variable rate demand obligations and floating rate notes, along with negotiating terms of swap agreements and termination of swaps
- Past financial management of the State’s Clean Water Fund and Safe Drinking Water Loan Programs, working with municipalities to obtain financial assistance from these programs
- Prior to working at the State of Wisconsin Capital Finance Office, worked for five years at the Department of Natural Resources in the State of Wisconsin Clean Water Fund Program

#### Involvement

- Past chair of the State Debt Management Network (SDMN)
- Past member of GFOA’s Committee on Governmental Debt Management
- NAMA member
- Chair of Stoughton Utilities Committee
- Advanced Emergency Medical Technician volunteer for Stoughton, Wisconsin
- Chief Election Inspector (State of Wisconsin/City of Stoughton)

**Bradley (Brad) Grams** is focused on federal inter-agency sustainability and enterprise risk management (ERM) policy within the infrastructure space, with a career crossing the U.S. Departments of Energy and Transportation, and the Environmental Protection Agency. Brad currently is a Regional Environmental Protection Specialist at the U.S. Department of Transportation’s Federal Aviation Administration, where they are the responsible official for climate, energy, environment, and sustainability solutions for domestic and international airport projects in the Great Lakes Region. Prior to their current role, they were the Acting Director of Planning at the EPA’s Office of the Chief Financial Officer, leading the Agency’s strategic planning and finance, ERM, and evidence and evaluation units. They also held other senior roles at the Agency, including Principal White House Liaison for Environmental Protection Budgeting, where they led the ERM and financial implementation of EPA’s climate change, sustainability, and climate and environmental justice initiatives, and Chief of Staff for Chemical and Waste Risk Management under the Great Lakes Restoration Initiative, where they led cross-government chemical and waste risk management collaborations. Prior to EPA, they also worked at the U.S. Department of Energy’s Argonne National Laboratory, leading a team focused on climate risk management in Chicagoland.

Outside of their government work, Brad is an Adjunct Lecturer at Northwestern University, focusing on strategic communication, program evaluation, and ERM in the public sector, and leading the institution’s Affinity Leaders and Learners (ALL) mentoring program. They also mentor students pursuing sustainability and ERM careers at The University of Chicago, Princeton University, Harvard University, and Yale University. They are a CGFM and hold degrees in Chemistry and Environmental Studies, both from the University of Chicago (AB/SB, 2005), and a Master of Public Policy and Administration (MPPA) degree from Northwestern University (2017), where they focused on global voluntary climate, energy, and environmental policy development. They also hold certificates in Executive Leadership in Sustainability from Harvard University, and Clean Energy Financing from Yale University.

**David Minch**, Partner, KerberRose S.C. has 10 plus years of governmental accounting and auditing experience. His specializations include: providing services to governmental entities, including audits, accounting services and various consulting services.

Furthermore, he oversees the completion of audits for a variety of Wisconsin municipalities, school districts, and governments. Additionally, he prepares financial statements and reports for the Wisconsin Department of Public Instruction, Public Service Commission of Wisconsin, and other state agencies. David has also worked with clients on implementing internal control systems, efficiency studies and fraud investigations. He brings a consultative approach to governmental entities by listening to their challenges and finding customized solutions through a variety of capabilities, including assurance, compilation, outsourcing, and advisory services.

David received his Bachelor of Business Administration from the University of Wisconsin, River Falls. He is a member of the AICPA and WICPA. He is active in the community, serving roles for the Ripon Area Youth Wrestling Club, First Congregational Church of Ripon, Ripon Cub Scout Pack, and coaching various youth sports teams.

Outside of work, you can find David on the water fishing, in a duck blind, sitting in a deer stand, or on a ball field coaching youth sports. His family has a passion for the outdoors, and he enjoys spending as much time as possible outside with his wife, son, two daughters, and the family dog Zeek.

**Amber Tigert**, Senior Auditor, KerberRose S.C. joined KerberRose more than two years ago and continues to grow her experience in public accounting. She specializes in providing auditing services to non-profit organizations, school districts and municipalities. Amber also provides tax preparation for IRS Form 990, 990-EZ and 990-T, as well as Wisconsin non-profit filing requirements. Additionally, she has prepared financial statements, single audits, and state financial report forms for government entities.

Amber received her Bachelor of Business Administration in accounting and finance from the University of Wisconsin, La Crosse. She is a member of AICPA and WICPA

Amber enjoys staying active in her free time by going to the gym, hiking, and running. She has run in a handful of half-marathons and would like to participate in an Iron Man in the future. Amber also likes traveling and spending time with family and friends.