



# Observations



*A monthly publication of the Chicago Chapter, Association of Government Accountants*

*AGA – Dedicated to serving the community and promoting government accountability*

*January 2011*

*Issue 3*

## *Upcoming Events*

### **Luncheon:**

January 18, 2011  
11:30 AM

### **Speaker:**

Brad Bobb,  
Financial Planner

### **Location:**

77 W. Jackson Blvd.,  
Room 328

### **Price:**

\$5 members  
\$12 non-members

**1 CPE**

Please RSVP to:

**Tom McManigal** at  
[tmcmanigal@hudoig.gov](mailto:tmcmanigal@hudoig.gov)  
**and cc**

**Matthew Matczynski** at  
[MMatczynski@hudoig.gov](mailto:MMatczynski@hudoig.gov)

Walk-ins Welcome!

## **Update your member information!**

Please review and update your personal information at National's website, [www.agacgfm.org](http://www.agacgfm.org). You can update your information in the 'Member's Only' page. This allows us to keep you better informed throughout the year!

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January 14, 2011

**Dear AGA Chicago Chapter Members,**

I would like to thank all of you for attending our most recent monthly luncheon. I would also like to thank Edward Carter for taking the time to speak during the meeting. Mr. Carter brought a wealth of knowledge and experience in financial crimes when he presented at our luncheon. The recent cases prosecuted by the Illinois Attorney General's Office, including the ATM card-reader scam, were particularly interesting and sparked great conversation. Thank you Mr. Carter for your time and effort!

Our next meeting will be held on Tuesday, January 18, 2011 at 77 W. Jackson Boulevard, GSA Conference Room 328. The speaker will be Brad Bobb who will be discussing Federal benefits and how they relate to retirement planning.

We had a great response to our Chicago Marines Toys for Tots drive. We collected more than 40 toys which were delivered to the United States Government Marine Corps at 3034 West Foster Avenue on December 21, 2010. Our community service chair did a great job in setting-up and executing the event!

Finally, we have open positions on our executive committee and are always looking for members to get more involved. Please contact Tom McManigal, President-Elect at [tmcmanigal@hudoig.gov](mailto:tmcmanigal@hudoig.gov) if you are interested in volunteering.

Sincerely,

*Tom McManigal*

Tom McManigal  
President-Elect



# Happy New Year AGA Chicago Chapter!!!!

**We would like to thank Mr. Ed Carter for speaking at our AGA Chapter meeting last month! Thanks to all who participated!**



*Mr. Ed Carter, Assistant Attorney General and Supervisor of Financial Crimes Prosecution from the State of Illinois and Mr. Tom McManigal, President-Elect, AGA Chicago Chapter*

## 2010-2011 Training Schedule

DATE*	TOPIC	SPEAKER	LOCATION
January 18, 2011	Federal benefits and how they relate to retirement planning	Brad Bobb, Financial Planner	77 W. Jackson Blvd., Room 328
February 11, 2011	Treasury's IPP for Electronic Invoicing	Paul Lionikis, Strategic Agency Relations Director for U.S. Treasury Internet Payment Platform (IPP)	77 W. Jackson Blvd.GSA Conference Room 331
March 14, 2011	TBD	Michael T. Kosanovich, Assistant Special Agent in Charge, Chicago FBI	77 W. Jackson Blvd.GSA Conference Room 331
May 4-5, 2011	Two-day PDC** \$175 cost per member	TBD	77 W. Jackson Blvd.GSA Conference Room 331

\*Dates subject to change

\*\* Two-Day PDC with breakfast & lunch/ (early bird discount of \$25 if registered by 3/31/11)

Please RSVP to **Tom McManigal** at [tmcmanigal@hudoig.gov](mailto:tmcmanigal@hudoig.gov) **and cc**  
**Matthew Matczynski** at [MMatczynski@hudoig.gov](mailto:MMatczynski@hudoig.gov)

**Please join us on Tuesday, January 18th**  
77 West Jackson Blvd.,  
**Room 328 at 11:30AM!!!**

**Price:**  
\$5 members  
\$12 non-members

## Speaker Bio

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### **Brad Bobb**

Brad Bobb started his career in financial services in 2001 after graduating from SIUE with a degree in Business Finance. He holds series 6, 7, 63, and 65 securities licenses and also life, health and annuity insurance licenses.

He began his career over eight years ago with Country Financial and has since transitioned to open up his own firm, Bobb Financial Group. Bobb Financial Group's mission is helping individuals build and protect wealth. Through using sound planning and investment strategies Brad helps individuals achieve their retirement dreams.

One of the main niches for Bobb Financial Group is federal employees. Two and a half years ago Brad became a federal retirement benefits specialist. As a federal retirement benefits specialist he has done presentations for Rural Development, FSA, ARS, EPA, SSA, IRS and OSHA to name a few. Retirement is one of the most underserved areas of the federal workforce and Brad has made it an essential part of his practice to help deliver the needed retirement information to the federal workforce. He is quickly becoming known throughout the Midwest as a specialist on federal benefits and retirement.

## Audio Conference

### One Year Later: Are We Winning the Improper Payments Battle? Jan. 19 Audio Conference, 2 - 3:50 p.m. EST

AGA, in conjunction with the National Association of State Auditors, Comptrollers and Treasurers (NASACT) and the Association of Local Government Auditors (ALGA), is pleased to announce a new and significant audio conference addressing the president's Executive Order dealing with improper payments.

A year ago, AGA held a national audio conference that addressed the then-new Executive Order, "Reducing Improper Payments and Eliminating Waste in Federal Programs." Improper payments were estimated to be \$110 billion for fiscal year 2009. At the time, the director of the Office of Management and Budget stated, "These errors and mistakes are unacceptable. Taxpayers deserve to know their dollars are being spent wisely and effectively."

Where do we stand one year later? As the president called for, is the "right recipient receiving the right payment for the right reason at the right time"?

On Jan. 19, panelists will provide their candid perspectives on where we stand today. They will share what has worked well, the challenges, and practical solutions to winning the improper payments battle. Given the state of the economy, the battle is very important to all taxpayers.

Speakers are **Jeanette M. Franzel, CGFM, CPA**, managing director, Financial Management and Assurance, U.S. Government Accountability Office; AGA Past National President **Jeffrey C. Steinhoff, CGFM, CPA**, executive director, KPMG Government Institute and a managing director at KPMG LLP, white paper author of "A Practical Look at Winning the Fight Against Improper Payments"; **George D. Strudgeon, CPA**, audit director, Human Services Management Specialty Team, Auditor of Public Accounts, Commonwealth of Virginia; and **Daniel I. Werfel**, controller, Office of Federal Financial Management, Office of Management and Budget, who is leading the administration's fight against improper payments.

Please join us for two hours of lively discussion about this important and timely topic. In addition to the speakers' commentary, about 20 minutes will be set aside for questions.

**Date:** Wednesday, Jan. 19, 2011

**Time:** 2 - 3:50 p.m. Eastern Standard Time

**Learning Objectives:** To learn how our government is progressing on the Presidential Executive Order on reducing improper payments and eliminating waste

**Prerequisite:** Some awareness of the issue of improper payment

**Advance Prep:** None required

**CPE:** Two credits

**Field of Study:** Management Advisory Services

**Cost:** \$249 per site (UNLIMITED ATTENDANCE) if you register on or before Friday, **Jan. 14, 2011** and \$299 thereafter. **SPECIAL PROMOTION:** Government agencies and CPAG members who register five or more office will receive a 20 percent discount (\$200 per site).

**To Register:** 1) [Register online](#) 2) [Print the registration form](#) or the [Special Promotion Registration](#) and fax it to 703.684.6933

This audio conference offers important information to almost everyone in the accountability profession. Please share this program announcement with others in your government, chapters, educational institutions and private firms. Remember, there is no limit to attendance per phone site. If you have any questions regarding registration, please contact [Maria Lucas](#) at 800.AGA.7211 ext. 308. Questions regarding the program should be directed to [Raymond Harris](#) at 518.280.6317.

## CGFM Corner



### The Mark of Excellence in Government Financial Management

#### CGFM Exams

Interested in the CGFM certification? Sign up for AGA's special [Intensive Review Course](#) and take the CGFM Examinations after the NLC. Don't miss this opportunity to earn your CGFM.

The Intensive Review Course will take place from 8:30 a.m. – 5:30 p.m. on Monday, Feb. 21, and Tuesday, Feb. 22, 2011. The CGFM Examinations will be offered by appointment only on Feb. 23-24.

The cost of the course is only \$279 for qualified participants, and it offers 18 CPE hours.

Special Bonus: The CGFM Examinations are offered at no cost to course attendees. The cost of this course is not included in the NLC registration fee.

#### **BEFORE YOU REGISTER, PLEASE READ:**

- ***What is the Intensive Review Course?*** It is a special limited enrollment opportunity for those individuals who have already been studying for the CGFM Examinations and want extra reinforcement of the material. It is a way to save money on the examination fees (and get the course with it!). It is a review of the main topics covered in the examinations. It is an opportunity to add the value of the instructor who can explain concepts, provide examples and answer questions for those who chose the self-study option. It is a refresher course for those who took the AGA instructor-led courses a long time ago. It is a great way to set a deadline for completing your certification examinations and get it done!
- ***What it is NOT:*** It is **not** a shortcut. The Intensive Review Course is **not** a substitute for the three AGA [instructor-led training courses](#). It is usually **not** enough by itself to prepare for the CGFM Examinations – advance preparation is strongly recommended (see [How do I prepare?](#) for more information). It is **not** an exam prep course with strategies on how to pass the exams.

#### **Registration**

To participate in this event, individuals must:

1. Apply for the CGFM Program (submitting CGFM application form, fee and college transcript – see Eligibility section below).
2. Pre-register for this event by submitting the [Intensive Review Course Registration Form](#) and appropriate fee. **Walk-ins will not be accepted.**

The complete application for the CGFM Program must be submitted BEFORE or TOGETHER with the Intensive Review Course Registration Form. Registrations for this event will not be confirmed until after the CGFM application is accepted.

Cancellations must be received by January 24, 2011; refunds will not be granted after this date.

**Deadline:** Registrations will be accepted on a first come, first-served basis. Space is limited, so we encourage you to sign up early. Registrations will not be accepted after **February 9, 2011**.

### **Location**

The Intensive Review Course and the CGFM Examinations will be held in Alexandria, VA near King Street Metro. The exact address will be provided to all registered attendees.

The facilities for this event are provided by Grant Thornton LLP.

### **Eligibility**

To attend the Intensive Review Course and/or take the CGFM Examinations participants must first apply and be accepted into the CGFM Program. Candidates need to submit the CGFM Program application form with \$85 application fee and a copy of a transcript from an accredited college or university.

The transcript must show that a degree (bachelor's or higher) was awarded and list at least 24 credit hours of courses in financial management or related topics. Applicant's name and the name of the college or university must appear on all transcripts. Please see [www.agacgfm.org/cgfm/start/](http://www.agacgfm.org/cgfm/start/) for more information.

In addition, those individuals who want to complete their CGFM at this event need to submit a [Work Verification Form](#) listing at least two years of professional-level government financial management experience.

*Prior attendance of CGFM training course(s) or purchase of the CGFM Study Guides is not required, but is strongly encouraged.*

If you have already taken a CGFM Examination and did not pass, you must satisfy the waiting period before taking that CGFM Examination at this event.

### **Materials**

No materials will be provided at the Intensive Review Course. However, participants are encouraged to order CGFM Study Guides at least six weeks before the course date. For more information on study guides visit [www.agacgfm.org/cgfm/prepare/studyguide.aspx](http://www.agacgfm.org/cgfm/prepare/studyguide.aspx).

*The cost of the study guides is not included in the price of the Intensive Review Course.*

### **Examination Information**

Three time slots are available for the CGFM Examinations on Feb. 23–24, 2011:

- 8:30 – 11:30 a.m.
- Noon – 3 p.m.
- 3:30 – 6:30 p.m.

*The actual exam time is limited to 2 hours and 15 minutes.*

Space is limited, so participants are encouraged to send in the registration form indicating their preference for an examination date and time as soon as possible. Some of the time slots may fill up and no longer be available. We will confirm your registration and indicate whether we are able to accommodate your request for the particular examination time slot(s).

Individuals who want to take the CGFM Examinations without attending the review course can do so by following the same registration procedures. The fee for taking the three CGFM Examinations is the same as the Intensive Review Course fee—see [Intensive Review Course Registration Form](#) for more details.

The CGFM Examinations are:

- Examination 1—*Governmental Environment*
- Examination 2— *Governmental Accounting, Financial Reporting and Budgeting*
- Examination 3—*Governmental Financial Management and Control*

More detailed information on CGFM Examinations content can be found on [www.agacgfm.org/cgfm/exams/](http://www.agacgfm.org/cgfm/exams/).

*The examination results will be available immediately.*

### **Testing Procedures**

You must be at the CGFM Examination registration desk at least 15 minutes prior to the testing time to check in. If you are not at the registration desk at the start of your examination time slot, we cannot guarantee your requested time slot.

**Please bring a valid photo ID to the CGFM Examination registration desk**—your ID must match the name you provide in the Intensive Review Course Registration Form and on the CGFM Program application form and must contain a photograph and a signature.

Personal belongings, including food, drink, papers, books, writing utensils, electronic and other organizers, cameras, cell phones, beepers, briefcases, bags, purses, pocketbooks and hats, may not be brought near the testing computer station and must be left in the designated area within the testing room. Scratch paper, a pen and a calculator will be provided.

For more information, please contact Crystal Vanison, Certification Program Coordinator, at [cvanison@agacgfm.org](mailto:cvanison@agacgfm.org) or 800.AGA.7211, ext. 316. Thank you!



**[Current list of active CGFM's!](#)**

**[Apply for the CGFM designation today!](#)**



**[AGA Training Opportunities](#)**  
**Click to find events near your area!**

## From the National Office

### **From the National President, Lisa Casias, CPA**

Happy New Year! I hope that you and your families had a wonderful holiday season and you're ready for another great year with AGA. We have lots of amazing things in store for our members and stakeholders in 2011. Before we look forward, however, I wanted to fill you in on a few things that happened late in 2010.

In December, AGA hosted the annual Associations Summit meeting, which brings together the top leadership from AGA, the Institute of Internal Auditors (IIA), the American Institute of Certified Public Accountants (AICPA), the Institute of Management Accountants (IMA), the Financial Executives Institute (FEI) and the American Accounting Association (AAA) to share information and build partnerships and trust. Each organization gave updates in the areas of membership, certification and emerging leaders. Other areas discussed included governance and the selection and training of new association leaders. AGA's reporting model, the Citizen-Centric Report, was also discussed and received kudos from everyone at the meeting as a means to convey meaningful information about government to citizens. [Read more.](#)

### **Leadership Positions Available on National Boards and Committees**

AGA is seeking candidates interested in filling vacancies on National boards and committees. Serving as a board or committee member might just be the most important contribution you will make to your own career and the profession. Take advantage now of this exceptional opportunity to:

- Contribute to the growth and success of your professional association
- Network with a dynamic group of accountability professionals
- Develop your leadership skills
- Develop solutions to meet present and future challenges
- Stay apprised of hot topics in financial management

**Commitment**--All board and committee terms begin each July 1. Board terms run for one, two or three years, depending on the board, and committee terms run for three years, with the exception of the conference committees, which run for one year.

**Qualifications**--If you are an AGA member in good standing, able to serve a full term of office, and can participate in board and committee conference call meetings, you are qualified to serve. [Specific qualifications for each committee are listed here.](#)

Learn more about the myriad of activities our boards and committees perform by [visiting the AGA website](#). The site contains the mission and objectives of boards and committees, further details about the commitment, and an online form that allows you to indicate which board or committee would make the best use of your qualifications and interests. If

you prefer, you can contact [Louise Kapelewski](#) at 800.AGA.7211, ext. 321 for more information.

Please contact us by **April 5, 2011**, [using the online sign-up form](#). Your submission will be considered for vacancies on committees you are interested in.

### **AGA Boards**

- Certificate of Excellence in Accountability Reporting Board
- Financial Management Standards Board
- Professional Certification Board
- Professional Ethics Board

### **AGA Committees**

- Awards Committee
- Bylaws & Procedures Committee
- Emerging Issues Committee
- Finance & Budget Committee
- International Development Committee
- National Leadership Conference Committee
- Professional Development Conference Committee

Thank you for helping us serve the accountability profession and your Association. We look forward to working with you.

### **Call for 2011 National Academic Scholarships**

Are you or a family member pursuing undergraduate or graduate studies in disciplines such as accounting, auditing, budgeting, economics, finance, information technology, public administration, etc.? If so, consider applying for an AGA National Academic Scholarship today!

Each year, AGA National awards:

- Up to four \$3,000 full-time merit scholarships to AGA members and their family members,
- Up to two \$1,000 part-time merit scholarships to AGA members and their family members, and
- One \$3,000 community service scholarship

The deadline for receipt of applications is Thursday, **March 31, 2011**. Apply now and take full advantage of your AGA membership. [Download a copy of the application](#). Contact [Louise Kapelewski](#) with questions.

## Committee Seeks National Award Nominations

AGA's National Awards Committee is now accepting nominations for 13 National Awards that recognize the leaders advancing our profession and setting the standards of excellence:

- . [Robert W. King Memorial Award](#)
- . [Einhorn-Gary Award](#)
- . [Frank Greathouse Distinguished Leadership Award](#)
- . [Achievement of the Year Award](#)
- . [Educator Award](#)
- . [Cornelius E. Tierney/Ernst & Young Research Award](#)
- . [Chapter Education Award](#)
- . [Chapter Service Award](#)
- . [Community Service Award](#)
- . [International Achievement Award](#)
- . [Chapter CGFM Award](#)
- . [Emerging Leader Award of Excellence](#)
- . [Regional Coordinator Award](#)

These awards will be presented during AGA's 60th Annual Professional Development Conference and Exposition in Atlanta, **July 10-13, 2011**. In many cases, individuals do not have to be members of AGA to be eligible. All nominations are due by Friday, **April 15, 2011**. Nomination forms are available online. For more information, contact [Louise Kapelewski](#).

## AGA Members, Families Eligible for Academic Scholarships

Are you or a family member pursuing undergraduate or graduate studies in disciplines such as accounting, auditing, budgeting, economics, finance, information technology, public administration, etc.? If so, consider applying for an AGA National Academic Scholarship today.

Each year, AGA National awards:

- . Up to four \$3,000 full-time merit scholarships
- . One \$1,000 part-time merit scholarship
- . One \$3,000 community service scholarship

Visit the AGA website to download applications for [high school](#), [undergraduate](#) or [graduate](#) students.

The deadline for receipt of applications is **March 31**. Please contact [Louise Kapelewski](#) at 800.AGA.7211, ext. 321, if you have questions. Apply now and take full advantage of your AGA membership.

## A National Staff

Have you ever wondered who is on the other end of the line when you call the National Office? To find out, click on ["Chapter Resources" in Members Only](#) and then scroll to the bottom under "National Office."



*For additional information regarding Chapter/ National news and events, please click on the links below:*

<b>Helpful Links</b>
<a href="#">Our Website</a>
<a href="#">Our Events Calendar</a>
<a href="#">Our Newsletters</a>
<a href="#">AGA National Website</a>

## **Executive Committee**

### **President**

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### **Past President**

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Vacant

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## **Newsletter Information**

Observations is the monthly newsletter of the Chicago Chapter of the Association of Government Accountants (AGA). Subscriptions to Observations may only be obtained by joining AGA. This is the third edition of Observations for the **2010-2011** chapter year. To submit material for upcoming issues, contact Alexandria Hayden at 312/353-3033 (phone) or 312/353-3814 (FAX). **To update delivery information, contact Alexandria Hayden at 312/353-3033.** If you are not receiving the Chicago Chapter Newsletter electronically, please send your current e-mail address to:

[Alexandria.Hayden@oig.hhs.gov](mailto:Alexandria.Hayden@oig.hhs.gov)