



2015 FALL CONFERENCE November 16-18, 2015

Monday, November 16, 2015 – Anchorage Downtown Marriott

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| 8:00 am – 9:00 am | Breakfast & Registration |
| 9:00 am – 9:15 am | Welcome and Introduction
Mayor Ethan Berkowitz, Municipality of Anchorage |
| 9:15 am – 10:30 am | State & Federal Public Assistance Grant Program
Sam Walton, AK DHS & EM |
| 10:30 am – 10:45 am | Break |
| 10:45 am – 12:00 pm | The Changing Environment of Financial Reporting
Karin Smith, Partner – Heinfeld, Meech & Co., P.C. |
| 12:00 pm – 12:15 pm | Associate Member Introductions
Facilitator – Paul Jarvis, Managing Director, Time Value Investments, Inc. |
| 12:15 pm – 1:30 pm | Lunch |
| 1:30 pm – 2:45 pm | Affordable Care Act (1094 & 1095 Reporting)
Jeff Ranf and Alicia Scalzo Wilmoth, USI |
| 2:45 pm – 3:00 pm | Break |

3:00 pm – 4:15 pm **State of the Budget**

Gunner Knapp, ISER

**Tuesday, November 17, 2015 – Anchorage Downtown
Marriott**

8:00 am – 9:00 am **Breakfast and Registration**

9:00 am – 10:30 am **Best Practices in Budgeting**

John Fishbein, GFOA

10:30 am – 10:45 am **Break**

10:45 am – 11:35 am **Post Issuance Compliance for Bonds**

Marc Greenough, Foster Pepper, and Joe Levesque, Levesque Law Group

11:35 am – 12:00 pm **Associate Member Introductions**

Facilitator – Paul Jarvis, Managing Director, Time Value Investments, Inc.

12:00 pm – 1:30 pm **Lunch & Business Meeting**

1:30 pm – 2:45 pm **Building a Better Budget Document**

John Fishbein, GFOA

2:45 pm – 3:00 pm **Break**

3:00 pm – 3:50 pm **Current Fraud Trends: Prevention & Best Practices**

Mike Mason, AVP, Product Support Manager e-Payment Solutions, First National Bank Alaska

3:50 pm – 4:40 pm **GASB Update**

Michelle Drew - BDO

6:00 pm – 11:00 pm **Banquet**

Dancing and Entertainment, Anchorage Downtown Marriott

Wednesday, November 18, 2015 – Anchorage
Downtown Marriott

8:00 am – 9:00 am Breakfast

9:00 am – 10:15 am Marijuana Update

Cynthia Franklin, Director – Alaska Alcoholic Beverage & Marijuana Control Board

10:15 am – 10:30 am Break

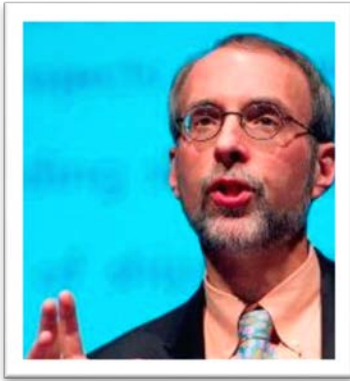
**10:30 am – 11:20 am How Will Municipalities Share in the Alaska
LNG Project Revenues**

Larry Persily, Assistant to KPB Mayor

11:20 am – 12:10 pm Bullying in the Workplace

Greg Fischer, Attorney Davis Wright Tremaine

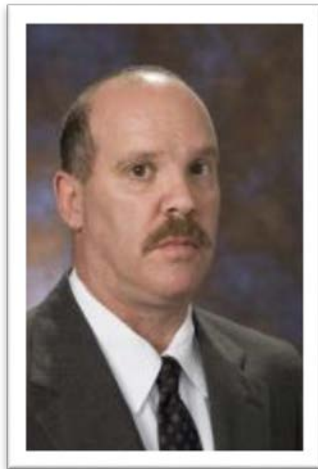
12:10 pm End of Conference – Thank you for attending!



Larry Persily

*Current Assistant to Kenai Peninsula Borough Mayor
Photo by Michael Penn – Juneau Empire*

Larry Persily is the former federal coordinator for Alaska North Slope natural gas pipeline projects, serving in that presidentially appointed position from March 2010 through March 2015. He is currently assistant to the Kenai Peninsula Borough mayor to represent the municipality with the proposed Alaska LNG project, in addition to working other oil and gas and fiscal issues for the borough. Larry has worked almost 20 years on Alaska oil and gas issues for three governors and the state legislature. He was deputy commissioner at the Alaska Department of Revenue and later worked in the governor's Washington DC office on oil and gas, tax and finance issues. Before joining government, Larry worked as a journalist in Alaska for 20 years.



John Fishbein

*Senior Program Manager,
GFOA – Center for Technical Services*

John Fishbein is a senior program manager in the Technical Services Center of the Government Finance Officers Association of the United States and Canada (GFOA) in Chicago, Illinois. Mr. Fishbein came to GFOA in 2002. He is responsible for the day-to-day operation of GFOA's Distinguished Budget Presentation Awards Program. He is the author of GFOA's recent publication on Building a Better Budget Document. He previously authored Preparing High Quality Budget Documents for School Districts and Preparing High Quality Budget Documents. He serves as staff to GFOA's standing Committee on Governmental Budgeting and Fiscal Policy. He has spoken at national and Internet training seminars and conferences on budgeting.



2015 AGFOA Fall Conference Speaker Biographies



Gunnar Knapp

Director

UAA's Institute of Social and Economic Research

Gunnar Knapp is the director of UAA's Institute of Social and Economic Research, as well as a professor of economics who has studied Alaska's economy and government for 35 years. He has broadly analyzed how Alaska's economy works—including how the state's geography and land ownership shape economic development, and how economic booms and busts drive population changes. Much of his work in the past year has been analysis of the ongoing state fiscal crisis,

brought on by falling oil prices that have left the state budget billions of dollars in the red. He is also an internationally recognized scholar for his work on fisheries markets and management of fisheries resources, especially salmon, in Alaska and worldwide.



Mike Mason, AVP

*Product Support Manager, E-Payment Solutions Dept.
First National Bank Alaska*

Mike Mason is the e-Payment Electronic Funds Transfer section head for First National Bank Alaska and reports directly to the Vice President of the e-Payment Solutions Department. He is a subject matter expert on ACH, Wires, Corporate Card Expense Management, Cyber Security, Payment Fraud, and Disaster Recovery Operations. He has experience in the coordination, planning and support of call center operations and providing corporate support. His team at First National Bank Alaska is responsible for ACH and Wire operations, conducting administrator training, and providing technical support

and expertise to corporate clients. Mike has 14 years of experience providing technical support; 7 at First National Bank Alaska and 7 outside the banking industry.



Joseph N. Levesque

Levesque Law Group, LLC

Mr. Levesque owns Levesque Law Group, LLC in Anchorage, Alaska which focuses on municipal law. Joe previously associated with WALKER & LEVESQUE, was the Borough attorney for North Slope Borough, and Assistant District Attorney in Kenai. Joe is a member of Alaska and Washington bars, as well as the National Association of Bond Lawyers.



Marc R. Greenough

Foster Pepper, PLLC

Marc is a member of Foster Pepper's Municipal Government and Public Finance practices and serves as bond counsel, underwriters' counsel and disclosure counsel on general obligation, revenue and special obligation financings by state, local and tribal governments. In addition, Marc has extensive experience in structuring municipal and public/private ventures and in providing representation in administrative proceedings and litigation.



Michelle Drew

CPA – Audit Partner

BDO USA, LLP

Michelle has over 18 years of auditing and accounting experience. She specializes in audit engagements with a focus on municipal governments with special emphasis on A-133 and Alaska Single Audit requirements. She serves on the BDO public sector industry group and the Anchorage office Assurance Quality Review team. Prior to joining BDO USA, LLP, Michelle served as an audit Partner with Mikunda, Cottrell & Co. where she served government clients and acted as the firm's audit quality assurance partner, ensuring firm compliance with professional standards and overseeing audit quality assurance for the entire office. Michelle also served as the government audit quality center

partner, as well as the employee benefit quality center partner.



Cynthia Franklin

Director, Alaska Alcoholic Beverage Control Board, Marijuana Control Board

Cynthia Franklin is the Director of the Alaska Alcoholic Beverage Control Board and the newly created Marijuana Control Board. Franklin testified before the Alaska legislature frequently regarding marijuana issues during the 2015 session. Franklin has a J.D. from Baylor University School of Law and served as a felony prosecutor in Texas for 17 years before moving to Alaska in 2007. Franklin was the Anchorage Municipal Prosecutor prior to her current appointment. Franklin heads a staff of five licensing specialists, seven enforcement officers and three

administrative employees responsible for all liquor and marijuana establishments in the State of Alaska.



Gregory Fisher

*Attorney
Davis Wright Tremaine*

Gregory Fisher practices general and complex commercial litigation with an emphasis in appellate litigation, labor and employment law, business torts, trade secrets, restrictive covenants, and computer security litigation. He works with clients to avoid costly litigation whenever possible and helps them find creative solutions to business problems. Gregory has a broad range of experience in jury trials and appeals when litigation is necessary. He has represented clients in state and federal court, before administrative agencies, and in arbitration proceedings.



Karin Smith

*Partner
Heinfeld, Meech & Co., P.C.*

Karin Smith received her Master in Business Administration from the University of Arizona, Master of Educational Leadership from Northern Arizona University, and Master of Public Administration from Arizona State University. Karin is a Certified Administrator in School Finance and Operations (SFO), as issued by the Association of School Business Officials International (ASBOI). Karin is also a Certified Fraud Examiner (CFE) certified by the Association of Certified Fraud Examiners (ACFE). Karin is a Partner at Heinfeld, Meech & Co., P.C., a certified public accountant and business consulting firm.



2015 AGFOA Fall Conference Speaker Biographies



Alicia Scalzo Wilmoth, JD

Sr. Vice President

Benefits Counsel USI Northwest

Alicia Scalzo Wilmoth, Senior Vice President and Benefits Counsel for USI Northwest, is responsible for monitoring and reporting on changes in benefits laws, including HIPAA, COBRA, FMLA, ERISA, state insurance laws and national insurance reform. Alicia serves as the National Practice Leader for USI's health and welfare compliance

team, made up of 10 benefits attorneys across the country. She writes periodic updates and newsletters highlighting general issues with respect to welfare benefit programs. Alicia is asked to speak regularly, both internally with benefits professionals and externally with clients and industry colleagues, explaining significant laws or regulatory changes. She works with the client service team to provide assistance with a wide variety of issues surrounding employer sponsored health and welfare programs.

Alicia earned her BA from Boston College and her JD cum laude from the Seattle University School of Law. She is a member of the Washington State Bar Association, American Bar Association, Western Pension & Benefits Conference, National Association of Health Underwriters and Seattle's Pension Roundtable.



Jeffrey A. Ranf

Vice President and Benefits Consultant

Benefits Counsel USI Northwest

Jeff joined USI in October, 2014 when USI purchased Wallace Insurance Group. Jeff was the owner and President of Wallace Insurance Group since 2006. Prior to joining Wallace, Jeff was the Executive Vice President for Brady Insurance which became Marsh USA Benefits in Anchorage from 2001 – 2005. He was also a partner at Western States Insurance Agency, Missoula Montana from 1986 – 1998 as Vice President of Financial Services & Benefits responsible for 7 offices in the state of

Montana. He has 31 years of industry experience and has served as a consultant/broker and lead advisor for many of Alaska's Native and non-Native employers.

Jeff's expertise is focused primarily in self-funded health plans including marketing of stop-loss insurance & underwriting. Jeff is a recognized authority in captive risk management in benefits for mid-market employers. In addition to managing the Alaska Federation of Natives Association Trust, Jeff has also worked extensively with public sector employers & related trusts. With a comprehensive understanding of the Alaska benefits industry and the Affordable Care Act, Jeff provides proven leadership as a consultant/broker his clients have come to expect.