



Chapter Executive Council Meeting Agenda

www.agacgfm.org/indianapolis

March 6, 2024

In Person/Microsoft Teams

Welcome – Ms. Katie Gambill

- Speed Networking event went well! It was recommended to secure and advertise senior leader participation for future speed networking events.
- It is possible to utilize Corp Comm for advertising.

BAP Mid-Year Meeting – Jennifer Welch

- Beta Alpha Psi (BAP) is a competitive accounting honor society. This year, they are holding a meeting for students in Indianapolis.
- Dani Powers and Jennifer will be attending on behalf of the chapter. The event starts at 11am Friday. Saturday everything ends at 1:30pm.

CGFM Month – Dan Neumann

- It's this month! We're working to get our proclamation from the city of Lawrence.
- BOGO test sale for CGFM exams this month.
- 3-4 members currently studying for it this month. 53 active and 14 retired CGFMs currently associated with the chapter.
- Announcement will be in the Daily News. Will be holding an info session and maybe a networking event with CGFMs now that we're in person.
- Idea for next year: CGFM lunch and learn in late February/early March to promote the month and cert.

ACE Report – Virginia Smith-Milan

- A certain amount of members have to renew by April 30 to get the bonus points.



- We budgeted for membership reimbursements for a randomly selected group of those who renew by March 31. A message can be sent to remind members.
- ACE reporting closes by May 1 (even though the AGA FY ends in June).
- We should send the membership satisfaction survey right after the PDC so we can get some results back in time to get the bonus points.
- Virginia will draft emails for active and inactive members and we will create a survey for membership satisfaction to go out with PDC.

AGA/ASMC Joint PDC Update – LaTrice Akers

- Registration went live last week. Dani is coordinating.
- Finalizing timeslots for each speaker.
- CSCI is sponsoring. Waiting to hear back from Kerney.
- Selling tables for advertising. Have 1 – American Benefits Exchange. CSCI and Decision Lens might. Decision Lens might do corporate sponsorship as well.
- Indy Ops HQ tasker went out this morning for registration. Registration closes April 12.

AGA National PDT – Jordan Cochran

- We budgeted for the NCC and one additional person to attend. This year, we will open the drawing for the additional person to the whole chapter, not just the CEC. Membership renewal will be required. Plan is to have the attendees in place by the April CEC.

Around the Horn

- Volunteer event is next week at Firefly. Catrina will find out if minors are allowed.