AGA Montgomery/ Prince George's County Chapter

Think Ahead ACCA

Institute of Management Accountants

ima The Association of Accountants and Financial Professionals in Business

Potomac & Chesapeake Regional Council

NABA INC. EMPOWERING BLACK BUSINESS LEADERS AT EVERY STEP IN THE JOURNEY

AGA Northern Virginia Chapter

AGA Government Financial Management Spring Workshop

April 23, 2025 I 8 CPE Hours

Washington, DC

It's about being effective and successful

What to expect?

An outstanding program is planned with dynamic speakers from the Federal Government, Regulators, and Professional Service Firms who will present new ideas in informative sessions.

Workshop participants can earn up to 8 CPE hours as follows:

— Business Management and Organization - 2.5 CPE hours
— Auditing (Governmental) - 2.0 CPE hours
— Personal Development - Non-Technical - 1.5 CPE hour
— Accounting (Governmental) - 1.0 CPE hour
— Computer Software and Applications - 1.0 CPE hour

NATIONAL REGISTRY OF CPE SPONSORS

AGA Montgomery/Prince Georges County Chapter is registered with National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPESponsors. State boards of accountancy have the final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website www.nasbaregistry.org

Details

Location:

KPMG LLP
MZ Level Conference Center
1801 K Street NW
Washington, DC 20036

Learning Objectives:

Participants will learn new management techniques and practical tips to increase efficiency in government financial operations.

Discussion Topics:

- Vision 2026: Shaping the Future of Accounting with Industry Leaders
- Fraud Prevention and Detection in Government: Trends and Developments
- Navigating New Horizons: Upcoming Updates to the GAO Green Book
- Adaptive Mindset for Resilience Training
- Navigating Financial Management Modernization in Federal Agencies
- Strategic Financial Leadership and Risk Management at the IRS: Insights from the CFO and CRO
- "Data-Driven Leadership: Enhancing Financial Integrity and Decision-Making with Power BI"

Advance Preparations:

None

Program Level:

Overview

Delivery Method:

Group Live

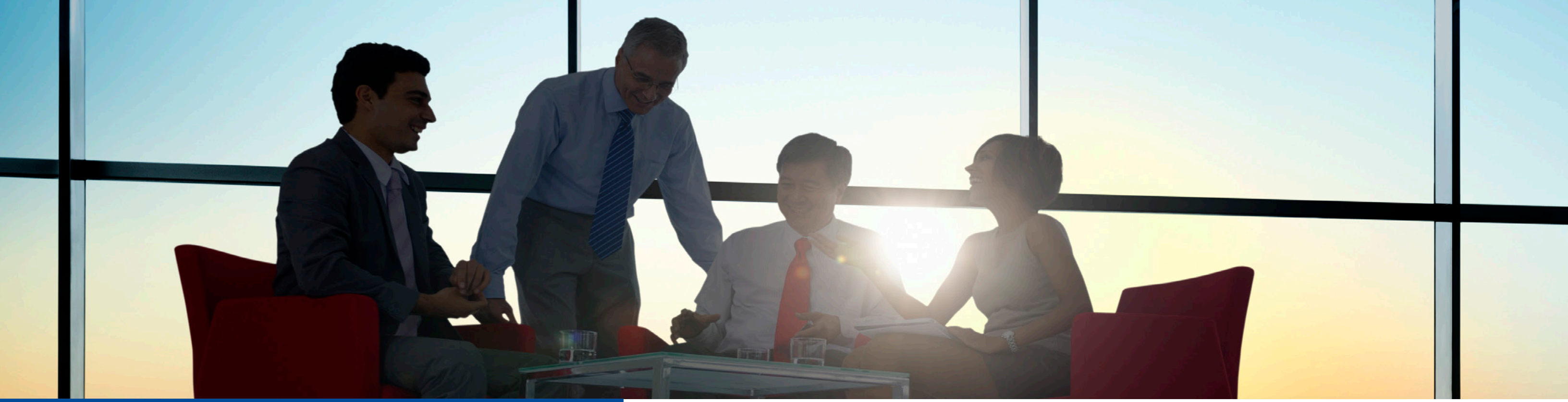
Who Should Attend:

- All Levels
- Auditors, Accountants, Financial Managers
- CPAs, CGFMs, ACCAs, IMAs, CMAs

Note: **No media/press are invited nor allowed to cover this event.**

Prerequisites:

None



Pricing

Early Bird Rates through February 28:

AGA, ACCA, IMA, & NABA Member	$50
Non Members	$75
Students	FREE

Rates after March 1:

AGA, ACCA, IMA, & NABA Member	$75
Non Members	$105
Students	FREE

Sign me up!

Registration

Please register at: https://form.jotform.com/250302865214146

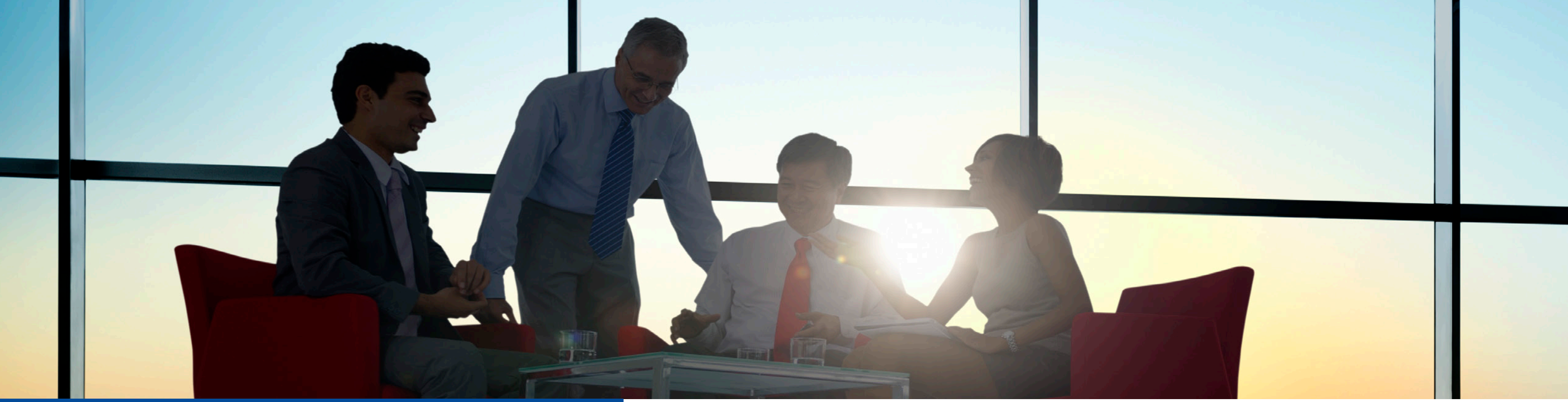
Meeting Policy

Refund policy: AGA Montgomery/PG Chapter cannot offer refunds and all transactions are final.

Attendance Policy

- To receive the 8 CPE hours you must attend the presentation from 8:00 a.m.–4:30 p.m.

For more information regarding complaint policies, please visit www.marylandaga.com



Program Agenda

7:30 a.m.–8:00 a.m.	**Registration and Breakfast**
8:00 a.m.–8:10 a.m	**Opening Remarks** Oluwatoyin Ojumu, President AGA – Montgomery/Prince George's County Chapter (MPG)
8:10 a.m.–9:25 a.m.	**"Vision 2026: Shaping the Future of Accounting with Industry Leaders"** **Moderator:** Ann Ebberts, AGA **Panelists:** Guylaine Saint Juste, NABA; Dianna Steinbach, IMA
9:25 a.m.–10:15 a.m.	**"Fraud Prevention and Detection in Government: Trends and Developments"** **Speakers:** David Hilton and Christopher Ekimoff, RSM
10:15 a.m.–10:25 a.m.	**Break**
10:25 a.m.–11:15 a.m.	**"Navigating New Horizons: Upcoming Updates to the GAO Green Book"** **Speaker:** Matthew Zaun, GAO
11:15 a.m.–12:30 p.m.	**Adaptive Mindset for Resilience Training** **Speaker:** Phil Moore, Kearney & Company
12:30 a.m.–1:30 p.m.	**Networking Lunch with Students**
1:30 p.m.–2:30 p.m.	**"Navigating Financial Management Modernization in Federal Agencies"** **Moderator:** Atisha Burks, SES **Panelists:** Childim Okonkwo, NASA; Katherine McGuinness, OPM
2:30 p.m.–3:20 p.m.	**"Strategic Financial Leadership and Risk Management at the IRS: Insights from the CFO and CRO"** **Speakers:** Teresa Hunter and Michael Wetklow, IRS
3:20 p.m.–3:30 p.m.	**Break**
3:30 a.m.–4:30 p.m.	**"Data-Driven Leadership: Enhancing Financial Integrity and Decision-Making with Power BI"** **Speaker:** Kermitt Francis, Teksouth
4:30 p.m.–5:30 p.m.	**Closing Remarks & Networking Reception** Carol-Ann Boothe, Maggie Huang, Farryn Jones, AGA MPG Jacob MacDonald & Kevin Love, AGA NOVA Mahmia Richards & Folashade Abiola-Banjac, NABA Brandon Schweitzer, IMA

Sponsor Appreciation

Platinum

A/C
ALLMOND & COMPANY, LLC

Gold level

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Silver level

KPMG

Bronze level

RMA Associates
Auditors. Consultants. Advisors.

ACCA
Think Ahead

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Speaker Bios

      

     

Ann Ebberts

AGA National Office

Ann Ebberts joined the AGA National Office team as its Chief Executive Officer in October 2014 after a career of 30+ years in the private sector consulting with the federal government. She leads the AGA National Office in delivering exceptional educational opportunities and member services to over 75 chapters. Under her leadership, AGA is committed to achieving strategic goals set forth by the National Governing Board, ensuring that members receive the resources and support they need to excel.

Ann holds a B.S. in Marketing Management from Virginia Tech and an M.S. in Systems Management from the University of Denver. She is also a certified Project Management Professional, demonstrating her commitment to continuous learning and professional growth. Joining AGA in 1999, she has established herself as a driving force in the organization, dedicated to empowering financial professionals and advancing public accountability.

Guylaine Saint Juste

NABA

Guylaine Saint Juste serves as President and Chief Executive Officer of the National Association of Black Accountants, Inc. (NABA), a nonprofit membership association that represents more than 200,000 Black professionals in accounting, finance, and related business professions.

Guylaine serves as a corporate officer on NABA's Board of Directors, overseeing the organization and spearheading the execution of NABA's multi-year strategic plan. Guylaine brings over 25 years of experience in the financial services industry to her role as NABA's leader, including previously working as Senior Vice President, Virginia Market Executive at Capital One Bank.

A change maker, innovator and activist at heart, Guylaine joined NABA in February 2021 to create a platform that will educate, empower and mobilize Black Business Leaders, advance equitable representation in the industry and foster meaningful career connections to close the opportunity gap long the talent continuum, from high school to the C suite and business ownership, offer strategic thought partnership to business and academia, and accelerate Black representation at all levels of executive leadership.

Guylaine was recently recognized by the AICPA and CPA Practice Advisor as one of the 2022 Most Powerful Women in Accounting for her significant contributions to the profession. Guylaine is a driving force in creating a culture of excellence, innovation, and inclusion. Her leadership has had a demonstrable effect on the accomplishments of NABA Inc., its members, and corporate partners.

Prior to joining NABA, Guylaine was Executive Director of the National Capital Region for Year Up, a national workforce development organization that works to ensure equitable access to economic opportunity, education, and justice for all young adults. During her five-year tenure, Saint Juste doubled the number of students Year Up served in the region, launched new curriculum and course tracks, and improved outcomes across all key performance indicators, growing revenue by over 40%.

Guylaine is the Founder and Co-Chair of the George Mason Women in Business Initiative, previously served as President and Co-founder of the Women's Alliance for Financial Education (WAFE) and was a board member for Goodwill of Greater Washington for nine years.

Guylaine holds a B.A. in International Relations from George Mason University and earned her graduate degree in retail banking management from the University of Virginia.

Dianna Steinbach

Institute of Management Accountants

Dianna Steinbach is IMA's senior vice president, growth and marketing. As an executive who has been responsible for critical finances in many different roles throughout her career, Dianna is a champion of telling a business' story through its numbers. She sees strategic finance as the foundation that enables an organization to achieve its goals as well as the place to measure progress and success.

Dianna is a Certified Association Executive (CAE) and an international operations expert who has managed associations as well as for-profit industry and event entities for more than 20 years. Her experience includes growing and diversifying operations and events in Asia Pacific, the Americas, Africa, Europe, Eurasia, and the Middle East.

From launching new programs to opening new business units to overseeing mergers and acquisitions, Dianna has a passion for helping organizations find the right path toward maximum success.

She is the programming chair and board member for the European Society of Association Executives (ESAE) and a member of the American Society of Association Executives (ASAE) International Associations Advisory Council. She regularly speaks and writes about association management topics for a variety of organizations. She also has been a faculty member for the Membership Marketing School and a past member of the IBTM World Association Leaders Forum Advisory Board. Dianna holds an Executive Master of Business Administration degree.

David Hilton

RSM US LLP

With over 20 years of experience conducting domestic and international investigations for Fortune 500 companies and their legal counsel, David has extensive experience in compliance, investigations and fraud risk management. David has led numerous organizational-wide compliance risk assessment and remediation programs, including several on behalf of clients under the supervision of government mandated compliance monitors. He has prepared reports for courts and regulators including the US Securities and Exchange Commission, the US Department of Justice, Financial Conduct Authority, and the World Bank Integrity Vice Presidency.

David is the Forensic leader for the Washington DC region.

Christopher Ekimoff

RSM US LLP

Christopher is a Director in the Financial Investigations & Dispute Services Group of RSM US LLP. Chris has significant experience providing litigation consulting and forensic accounting services—including as an expert witness on behalf of his clients—performing internal investigations, applying and evaluating financial reporting methods, responding to allegations of accounting and auditing malpractice, asset tracing engagements, and other complex financial and accounting issues. He is a co-host of the inSecurities Podcast from the Practising Law Institute, and an Adjunct Professor at the Antonin Scalia School of Law at George Mason University. Chris also heads the FIDS Blockchain and Crypto Solutions Incubator at RSM.

Chris leads engagements regarding SEC financial reporting matters, public company restatements, Foreign Corrupt Practices Act (FCPA) investigations and corporate compliance. Additionally, he has overseen the development and implementation of fraud risk management programs, as well as the performance of internal investigations at companies in the financial services, construction, hospitality, manufacturing, and technology industries. Chris has contributed to matters including revenue recognition issues, audit malpractice claims, alleged SEC reporting violations, complex GAAP & GAAS accounting policy issues, whistleblower allegations, and mortgage-backed securities litigation.

Matthew Zaun

U.S. Government Accountability Office

Mr. Zaun is a Senior Auditor for the Financial Management and Assurance team at the U.S. Government Accountability Office (GAO). Mr. Zaun is part of the Standards group, and his duties have included developing comment letters to respond to proposals of national and international standard setters and responding to Yellow Book and Green Book (Standards for Internal Control in the Federal Government) technical assistance inquiries. Mr. Zaun also serves on various AICPA task forces. Additionally, his areas of responsibility have included financial statement and performance audits of government entities.

Mr. Zaun holds Bachelors of Science in Finance, Management, and Accounting, and a Master of Accounting and Information Systems from Virginia Tech.

Phil Moore

Kearney & Company

Phil is a Partner and the IT Risk Practice leader at Kearney & Company. Phil has over 23 years of professional Information Technology (IT) assurance, financial, and consulting experience, including work in both civilian and defense federal agencies.

Phil is a Certified Public Accountant (CPA), a Certified Information Systems Auditor (CISA), and Project Management Professional (PMP), and certified by TRACOM® to teach several of their communications and mindset training programs.

Atisha Burks

Senior Executive Service

As Chief Financial Officer (CFO) for the Government, Atisha leads actions to sustain and improve business operations to meet goals. Atisha provides executive leadership in financial management, acquisitions, and risk management, and ensures that the results of financial transactions are analyzed and interpreted to determine the impact upon resources.

Atisha previously served as a Senior Leader (Financial Operations) with the Department of Navy, Chief of Financial Reporting, Policy, and Property with the U.S. Coast Guard and most of her career at the Department of Commerce where she served as the Department's Director of Financial Reporting and Policy.

Chidilim Okonkwo

National Aeronautics and Space Administration

Chidilim "Chi" Okonkwo is Director of Agency Financial Systems at NASA Headquarters Office of the Chief Financial Officer (OCFO) leading the modernization of the Agency's budget and financial management application portfolio across the CFO Enterprise made up of 9 Centers including the massive upgrade of NASAs core financial management system. Mrs. Okonkwo has experience supporting innovative financial system implementations as a Systems Accountant at NASA and gained experience modernizing Federal legacy systems prior to joining NASA at the Office of Personnel Management (OPM) and BearingPoint.

Advocate of continuous innovation, Ms. Okonkwo is energized by the adoption of emerging technology to transform customer experiences and empower the federal workforce of the future utilizing secure and intelligent platforms, tools and services. Ms. Okonkwo is an active member of NASAs IT Systems Transformation, Agency Software Management as well as Enterprise Digital Transformation teams established to assess and explore cutting edge capabilities to enhance NASA mission success and outcomes.

Mrs. Okonkwo is a Certified Government Financial Manager and holds a Bachelor of Business Administration in Accounting from Howard University and Dual Master of Science in Accounting and Information Technology from the University of Maryland. She is a Fellow of the American Council for Technology - Industry Advisory Council (ACT-IAC) Partners 2022 class.

Katie McGuiness

U.S. Office of Personnel Management

Katie McGuinness is the Associate Chief Financial Officer (ACFO) of Financial Services at the U.S. Office of Personnel Management (OPM). She oversees the management of one of the largest trust funds in the Federal government for the earned benefits program. She manages financial operations, reporting, and compliance under the Office of the Chief Financial Officer at OPM. Katie is also a member of the Council on Federal Financial Assistance (COFFA) and is committed to advancing the mission and values of the federal government, and to delivering high-quality financial services and solutions to support its goals and objectives.

Previously, she served as the Deputy Chief Financial Officer (DCFO) at the U.S. Consumer Product Safety Commission (CPSC) in support of the mission to keep consumers safe from hazardous products in the marketplace.

Katie is a Certified Public Accountant (CPA) and a Certified Governmental Financial Manager (CGFM). She earned her Bachelor of Science and Business Administration degree in Accounting at the University of Richmond.

Teresa Hunter

Internal Revenue Services

Teresa R. Hunter serves as the Chief Financial Officer at the Internal Revenue Service (IRS). She is the principal advisor to the IRS Commissioner, Deputy Commissioner, and Chief Operating Officer. She leads the IRS's financial management programs and oversees financial policies and programs, budget formulation, and execution of a multi-billion dollar budget. She also manages the $5+ trillion revenue collected each year.

Previously, Teresa served as the Deputy Chief Financial Officer at IRS. Teresa served at the Department of the Interior as the Deputy Director of the Office of Financial Management. Previously, Teresa served as the Assistant Director in the Risk Management and Assurance Division at the Department of Homeland Security and the Internal Control Manager in the Office of Financial Policy and Operations at General Services Administration.

Teresa graduated from James Madison University. She is a Certified Public Accountant and has six years of public sector financial management experience at KPMG LLP.

Mike Wetklow

Internal Revenue Service

Mike began his career in audit positions at KPMG, the Government Accountability Office (GAO), and the Maryland Legislative Auditor's Office, auditing federal, state, and local governments.

His first leadership position was at the Department of Homeland Security (DHS), where he led efforts to eliminate material weaknesses and secure the agency's first audit opinion. After DHS, Mike worked at the Office of Management and Budget (OMB) as a branch chief, advising on government-wide policies related to financial systems, risk management, and internal controls. While at OMB he also updated OMB Circular A-123 to introduce ERM into government-wide policy. Next, Mike served as the Deputy Chief Financial Officer at the National Science Foundation (NSF), managing enterprise risk management (ERM), internal controls, and financial reporting for the agency's $9 billion budget. He was instrumental in implementing NSF's first ERM profile and exploring Fintech innovations.

Currently, Mike is the Chief Risk Officer (CRO) at the Internal Revenue Service (IRS), where he oversees Enterprise Risk Management and audit relations by focusing on promoting innovation, leveraging data, reducing compliance burdens, and fostering innovative environments that help organizations and people thrive.

Mike Wetklow is also an Adjunct Professor at George Mason University, where he teaches Federal Accounting and Advanced Accounting Analytics. Additionally, he serves as a volunteer member of the Accounting Advisory Board at Northern Virginia Community College. He holds a BS in Accounting and an MPM in Public Sector Financial Management from the University of Maryland (UMD) and an MS in Data Science from the University of Virginia (UVA). Mike is also a licensed CPA. Outside of his professional career, Mike enjoys spending time with family and friends.

Kermitt Francis

Kermitt Francis

Kermitt L. Francis II is a skilled Intuitive Budget/Financial Analyst with over 20 years of experience supporting accounting and financial processes for the Department of Defense (DoD). Specializing in creating and implementing high-performance accounting strategies, Mr. Francis has developed dashboards and analytical tools that directly influence the growth and profitability of large corporate Fortune 500 companies and government practices. Throughout his career, Kermitt has provided financial management and senior level support to the DoD, helping identify areas of improvement and automating financial processes that keep budget tracking and finance activity consistent and auditable. His business acuity, technical expertise, and leadership capabilities have contributed to several successful accounting, budget, and financial management efforts and have been lucrative assets to the Teksouth team in our support of the DoD's financial well-being.

Recently, Kermitt has transitioned into a pivotal role as Director of Business Development, where his unique blend of technical acumen and strategic thinking is poised to make a profound impact. Leveraging his deep understanding of analytics & finance, Kermitt is dedicated to identifying emerging opportunities and forging strategic partnerships to propel Teksouth forward in an ever-evolving digital landscape.

Driven by a relentless pursuit of excellence, Kermitt remains committed to staying at the forefront of technological advancements and leveraging his expertise to empower the mission of Teksouth. His unwavering dedication, coupled with his diverse skill set, positions him as an asset within the federal community, driving innovation and fostering growth for years to come.

Education Directors

Carol-Ann Boothe

Maggie Huang

Farryn Jones

CPE Credit Information

Title: Vision 2026: Shaping the Future of Accounting with Industry Leaders

Description: Join industry leaders and CEOs from top accounting organizations as they discuss strategic visions for the future of accounting. This panel will delve into upcoming trends, technological advancements, and regulatory changes that are poised to reshape the industry. Gain unique insights into the collaborative strategies and innovative approaches envisioned to advance the accounting profession by 2026.

Learning Objectives: After completing this session, participants will be able to:

- Identify emerging trends and technological innovations that will have an impact on the accounting profession.
- Analyze the potential effects of upcoming regulatory changes on accounting practices.
- Discuss strategies for adapting to and leading through the evolving landscape of the accounting industry.

NASBA Field of Study: Business Management and Organization

Duration: 75 minutes (1.5 CPE hours)

Program level: Overview

Prerequisites: None

Advance Preparation: None

Title: Fraud Prevention and Detection in Government: Trends and Developments

Description: High-level overview of the latest trends, tools and technology in fraud risk management, detection, and response.

Learning Objectives: After completing this session, participants will be able to:

— Describe approaches to fraud detection in the government setting.

— Recognize recent trends in fraud

— Understand recent developments in fraud detection and technology.

NASBA Field of Study: Auditing (Governmental) - Technical

Duration: 50 minutes (1.0 CPE hour)

Program level: Overview

Prerequisites: None

Advance Preparation: None

Title: Navigating New Horizons: Upcoming Updates to the GAO Green Book

Description: *Standards for Internal Control in the Federal* Government, commonly referred to as the Green Book, provides an internal control framework for government management. This update will discuss proposed revisions to the Green Book.

Learning Objectives: After completing this session, participants will be able to:

— Provide an overview of the key proposed updates to the Green Book.

— Provide an explanation of implications for users of Green Book and next steps.

NASBA Field of Study: Auditing (Governmental) - Technical

Duration: 50 minutes (1.0 CPE hour)

Program level: Overview

Prerequisites: None

Advance Preparation: None

Title: Adaptative Mindset for Resilience

Description: Based on decades of research in clinical psychology and this course teaches strategies that are proven to help people become more adaptable to change and resilient to workplace stressors. You will learn how to recognize and overcome your negativity bias.

Learning Objectives: After completing this session, participants will be able to:

— Recognize the impact that your Negativity Bias has on your thoughts, behavior, and resilience.

— Apply active thinking to counteract your Negativity Bias.

NASBA Field of Study: Personal Development

Duration: 75 minutes (1.5 CPE hours)

Program level: Overview

Prerequisites: None

Advance Preparation: None

Title: Navigating Financial Management Modernization in Federal Agencies

Description: This session will delve into the challenges and successes of modernizing financial management systems within federal agencies, featuring insights from key financial leaders who are spearheading these initiatives. Participants will learn about the strategies employed to enhance financial operations and the impact of technology on improving efficiency and accountability.

Learning Objectives: After completing this session, participants will be able to:

- Understand the key drivers behind financial management modernization in federal agencies.
- Identify the challenges and strategies associated with upgrading financial systems.
- Learn from case studies of successful financial system implementations and the lessons learned.

NASBA Field of Study: Governmental Accounting

Duration: 50 minutes (1.0 CPE hour)

Program level: Overview

Prerequisites: None

Advance Preparation: None

Title: Strategic Financial Leadership and Risk Management at the IRS: Insights from the CFO and CRO

Description: This session will explore the crucial roles that strategic financial leadership and risk management play at the IRS. Attendees will gain a firsthand look at how these top executives navigate complex financial landscapes to enhance agency performance and compliance.

Learning Objectives: After completing this session, participants will be able to:

- Identify the components of effective financial leadership within a major federal agency.
- Understand the role of risk management in ensuring the integrity and efficiency of financial operations at the IRS.
- Explore the best practices in financial management and risk assessment applicable to both government and private sectors.

NASBA Field of Study: Business Management & Organization

Duration: 50 minutes (1.0 CPE hour)

Program level: Overview

Prerequisites: None

Advance Preparation: None

Title: Data-Driven Leadership: Enhancing Financial Integrity and Decision-Making with Power BI”

Description: Explore the transformative power of Microsoft Power BI in leadership roles, focusing on improving financial integrity and enhancing decision-making processes. This session will demonstrate how data-driven strategies, supported by Power BI's robust analytics capabilities, can foster a more transparent, efficient, and accountable financial environment.

Learning Objectives: After completing this session, participants will be able to:

- Understand the fundamental features and functionalities of Power BI relevant to financial reporting and analysis.
- Apply data visualization techniques in Power BI to communicate financial insights effectively.
- Develop strategies to enhance data-driven decision-making and leadership within their organizations.

NASBA Field of Study: Computer Software and Applications

Duration: 50 minutes (1.0 CPE hour)

Program level: Overview

Prerequisites: None

Advance Preparation: None

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