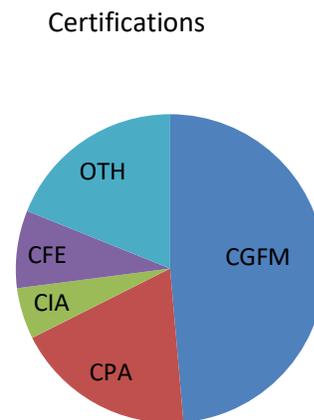
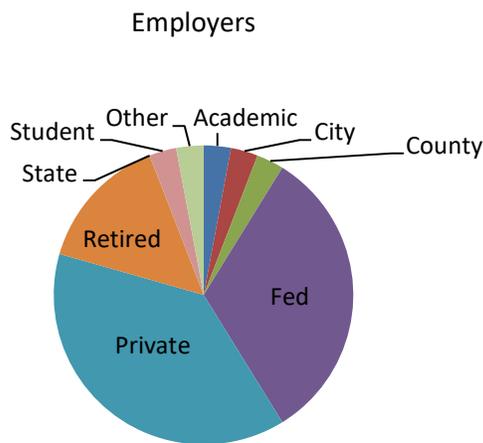


Who are We?

Our Chapter was established in **1957**, making it one of the oldest in the Country! The San Antonio Chapter is comprised of professionals within the **Federal, State, Local, and Private sector**. Additionally, our network provides members the ability to reach out to professionals across the nation. AGA is the member organization for government financial management professionals. We lead and encourage change that benefits our field and all citizens. Our training events, professional certification, publications and ongoing education help members build their skills and advance their careers.

We look forward to meeting you, helping you reach your professional goals, and creating memories while networking with professionals in our community.

As of **31 March 2023**, we had **34 members** in the following fields, holding one or more professional certifications:



2019-2023 Chapter Officers

President Mary Lou Saldivar, CGFM
 Treasurer Rafael Perez, CGFM CPA
 Secretary Jeremy Blain
 Membership Gwendolyn R Sewell, CGFM

2023-2024 Chapter Officers

President Alice S. Hufnagle, CGFM(Ret) CPA(Ret) CFE(Ret)
 Past President Mary Lou Saldivar, CGFM
 Treasurer Rafael Perez, CGFM CPA
 Secretary Julio C. Elizondo, Jr. MSF
 Membership/NCC Gwendolyn R Sewell, CGFM
 Education Ronald G Prather CGFM
 Christopher A Goeman CGFM CPA
 Social Media/Webmaster Blanca Castro

See our Web site for information regarding our next local event. Follow us on Facebook and LinkedIn.

Website: <https://www.agacgfm.org/sanantonio>

Facebook:

<https://www.facebook.com/AGACGFM.SA/?eid=ARAlziqyUMq6rHxOeTjDvvzflNgo35IIOJreeo7Qhq-GEJyGf8iWVE8etas>

LinkedIn: <https://www.linkedin.com/company/aga-san-antonio-chapter/?viewAsMember=true>

How are we Doing?

After some years of low activity, we began to revitalize our chapter in **2019** and held Free 1 CPE training on **Data Analytics** (9/19/19 – picture right) and **Buidling Your Professional Presence** (1/30/20).



Each included a minimal cost (\$12/member) lunch. We received a **Chapter Recognition Award** for achieving our program goals (see below).



**Chapter Recognition Program:
Achieved Goal**

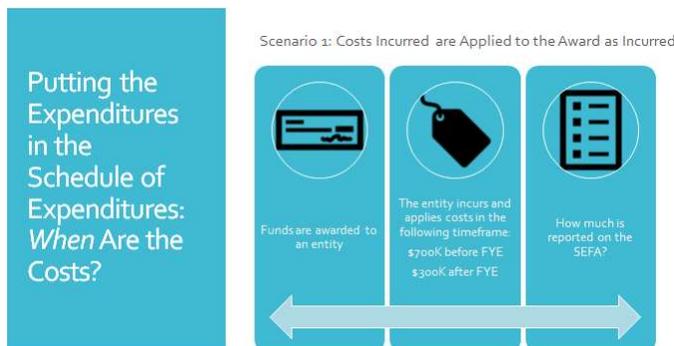
- Aroostook County
- Charleston, SC
- Cincinnati
- Dover Capital
- North Carolina Triangle
- Olympia
- Portland
- San Antonio
- San Francisco
- South Dakota
- West Central Mississippi

Then **COVID** hit and shut everyone down! We leveraged technology and presented **Basic Cyber Security at Home** (10/15/20) while some of us made tent visits to Assisted Living Facilities, and **Ethics & Decision Making** (11/19/20 – graphic below).

#PDT20



In **2021-2022** we started to **climb out of the Pandemic** and presented free Webinars to help our members cope, including **Federal Response to the COVID-19 Pandemic** (4/16/21) and **CARES Act and Covid-19 on the Single Audit** (2/16/22 – graphic below).



2022-2023 saw many changes, as people struggled with a balance of work-at-home and return-to-the-office. Our members remained loyal, however, taking **AGA National Webinars** to learn and keep up their CPEs.

Clearly, by the beginning of the **2023-2024** year, we were ready to begin another revitalization effort! After several **Zoom sessions with AGA National** personnel, an **August 2023 Happy Hour** at Stone Werks Big Rock Grille, and major muscle, we have a fantastic future ahead of us!

Financial Information

Our chapter has been a Nonprofit 501(c)(3) organization since May 1991. A 501(c)(3) is defined as an organization for, among others, educational, charitable, and scientific purposes. As such, **we aren't in the business to make money**, but rather to earn enough to allow us to offer no- or low-cost professional development, education and training, and networking opportunities to our members.



We file an annual Form 990, Return of Organization Exempt From Income Tax with the IRS.

Revenues

Our primary source of revenue comes from member dues to AGA National. We have not collected local chapter dues for several years. For an average of 30 members, this equals about \$450 annually.



Other income comes from members registering for a meeting at which we provide lunch, and our goal is to collect only as much as we spend on food.

We also earn a minimal amount of interest income on bank deposits.



Expenses



Our primary expenses are to maintain sponsorship certification with the Texas State Board of Public Accountancy, which has been \$400 annually for the last several years. This allows our training to be recognized as Continuing Professional Education (CPE) for Texas CPAs, as well as for several other certifications, such as the CGFM.



Other expenses are for food served at member meetings.

What's Next?

As we mentioned previously, we have begun a revitalization effort for our chapter with the **2023-2024** year. We are planning **monthly luncheon meetings with free CPEs**, supplemented with **virtual access** for our remote workers.

We are currently scheduled to host a luncheon CPE meeting on the **second Thursday of the month through June 2024**.

We are meeting at the Alamo Area Council of Governments (**AACOG**) Building at 410 & Perrin Beitel in San Antonio.

We are holding after-action/pre-planning Zoom meetings on the third Tuesday of the month.



GASB Update, presented by Chris Goeman CPA CGFM 9/14/23



Chapter President Alice Hufnagle thanks Phillip Ashley, Associate Deputy Comptroller for Tax Administration, Texas Comptroller of Public Accounts, 10/12/23

We are also participating in the (Free) **Midwest (Area 3) Virtual CGFM Study Group**.



Join the AGA Midwest Study Group

The AGA Midwest Chapters are excited to launch a virtual CGFM Study Group for Exam 1 – Governmental Environment.

Meetings take place every **Monday and Thursday, 4:30–5:30 p.m. CST** starting **November 6**. The last meeting will take place **December 7**.

Participation is **FREE** – bring your own study guide!

We have the following training events planned for the rest of the year:

11/9/23 - Albert Uresti, MPA PCAC CTOP
Bexar County Tax Assessor-Collector

12/14/23 - Andrew Gibbs, CGFM, IBM, Artificial Intelligence
Holiday Toy Drive

1/16/24 - Yellow Book Update, by Corrie Stokes, CIA CGAP CFE, Austin City Auditor,
Yellow Book Advisory Council Member

We're looking forward to a great year! Come and join us!