



SOUTHERN
WISCONSIN
CHAPTER



Monthly Footnotes

JANUARY 2018

HAPPY NEW YEAR
2018

Welcome Members and Non-Members

Thursday, January 25
Lunch Meeting

TOPIC: Annual Tax Update

SPEAKER: Sara Loose, CPA
Senior Accountant
Baker Tilly Virchow Krause LLP

REGISTRATION: 11:30 a.m.

LUNCH: 11:45 a.m.

COST: \$6 for Members, \$12 for Non-Members

PLACE: Babe's Restaurant, 5614 Schroeder Road, Madison, Wisconsin 53711

MENU: Meals served with house cut pub fries and include soda, coffee, or tea.

- Cheeseburger with cheddar cheese
- Grilled chicken breast on a toasted Brioche bun with lettuce, tomato, pickle, and side of mayo
- Club sandwich – three layers of whole wheat toast with ham, turkey, bacon, lettuce, tomato, and mayo

RESERVATIONS: Contact Sherri Voigt by 1 p.m. on Monday, January 22, 2018 with your name, membership status, meal choice (and for carpooling information) at (608) 266-2814 or sherriv@live.com.

Register on-line at www.aga-wis.org

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NEW MEMBERS FIRST LUNCHEON MEETING IS FREE!

If you are a new member and you are attending your first luncheon, it's **FREE!** Please note this when making reservation.

Subscribe to AGA Southern Wisconsin Chapter News at
www.aga-wis.org

ABOUT THIS MONTH'S SPEAKER

Sara Loose CPA
Baker Tilly Virchow Krause LLP



Sara Loose, CPA

Senior Accountant

608 240 2535
sara.loose@bakertilly.com

Sara Loose, a senior accountant with Baker Tilly Virchow Krause, LLP, has been with the firm since January 2015. Sara specializes in providing accounting and tax services to construction and real estate clients. Sara received her Masters of Professional Accountancy from the University of Wisconsin-Whitewater.

Member Benefit

Members can bring their supervisor to one lunch meeting a year for free!!!

This is our thank you to them for supporting member activity and training.

PRESIDENT'S MESSAGE
Sherri Voigt, CGFM, CPA

Welcome to 2018!

Our January 25 lunch meeting is the Annual Tax Update. Sarah Loose from Baker Tilley Virchow Krause will be covering any changes for the 2017 tax year, and covering some highlights of the recent tax acts that will impact the 2018 tax filing season.

We will collect items for the Salvation Army at the January lunch meeting. Page 5 of the newsletter has a nice photo of the last donated items and some information about the organization. There is also a list of commonly needed items on page 4. Diapers are a wonderful item to donate to families in need.

Our audio conference schedule for the year kicked off in December. Check out our calendar of events for the upcoming dates. These are 2 CPE each, and are free to members.

Planning and scheduling has been taking place for the Annual Symposium. There are some great topics lined up and a training brochure will be ready next month.

Mark your calendars now: Wednesday, May 9, 2018
UW-Madison Union South

We are always looking for topic and/or speaker ideas for lunch meetings and training sessions. If you have any ideas to share, please reach out to our Education Chair, Mary Laufenberg, at maryendres6998@gmail.com

Sherri Voigt, CGFM, CPA

☘ =^..^=

Chapter News

Salvation Army Donations

The Salvation Army greatly needs the following items:

- Adult T-shirts
- Diapers - All Sizes (5 & 5 needed most)
- Baby Bottles
- Sanitary Items
- Men's deodorant

Items will be collected at luncheon meetings.

The AGA Southern Chapter continues to support the Salvation Army Shelter and Community Center. Thank you AGA members and non-members for all of your wonderful support, it is greatly appreciated.

Donations to the Salvavation Army of Dane County

THANK YOU FOR YOUR SUPPORT!



Information about The Salvation Army

The Salvation Army is an international organization founded by William Booth, a London minister, in 1865. In Wisconsin, its Madison Corps is the local unit that governs the activities of The Salvation Army of Dane County.

For over 126 years, the Madison Corps has offered spiritual ministry, social services, and youth programs to thousands of Dane County residents annually without discrimination. The Salvation Army of Dane County serves the most vulnerable members of our community through a wide range of programs, as well as extensive case management services with the primary goal of improving the life skills and circumstances of those they serve.



The Salvation Army

Dane County

National News

The Best Defense Starts With You

By Louise Burnette, MPA, and David Payne

Does this sound familiar?

“Hi, this is your president. We need to pay a vendor for supplies from our recent event. Please send a check for \$1,200 to the following address. Thank you for your timely attention to this manner.”

We aren't the only association that has been targeted by scammers, nor is it just an association-industry issue. At AGA, however, we have “accountants” in our organizational name, and it tells scammers that we likely have access to funds — putting us at greater risk. And their messages look real! They seem to come from legitimate email addresses and include banking information, names and addresses. Some messages even include the names of officers.

So what can we do to keep our chapters safe? The answers are simple — internal controls and website security!

Internal controls

If you receive a suspicious email, pause and rely on your instincts and internal controls. Here are a few tips we've found, especially in this [article](#) from the Federal Trade Commission (FTC):

1. Double-check the email address. Our brains automatically correct some misspellings, so pay close attention to the email address.
2. Hover over the email address to make sure the address in the tool-tip matches the email address in the “from” field.
3. Forward the message to the known email address of the officer requesting payment (i.e. if they use their work email, but the message is from a personal email address, use the one you're familiar with).
4. Pick up the phone! Directly contact the person (e.g., an AGA chapter member) that “appears” to be requesting funding, information, etc. before quickly responding to an email — or worse yet, opening an attachment.
5. Do not reply to the email address. This will confirm for the scammer that the email address is live and can result in follow-up contact.
6. Does the sender seem pressed for time? Don't feel rushed simply because of an “urgent” email. A minute of caution can save thousands of dollars.
7. Do your own typing. If someone sends you a link or phone number, don't click. Use your favorite search engine to look up the website or phone number yourself.

8. Report phishing emails and texts. The aforementioned [FTC article](#) tells you how.

Website security

Many AGA chapters have recently been hit by phishing scams like the one described at the beginning of this article. Sophisticated scammers use "bots" to scan public websites for email addresses, then use the addresses to contact their targets. So, leverage the web tools at your disposal to implement these safeguards:

1. Use links! Ensure that you [link](#) to email addresses on your website rather than writing them out, as we've done in this sentence. If you have an AGA-hosted website, refer to the "Working with Documents and Links — Link to an Email Address" section of the user guide.
2. Update your leadership roster settings. We've changed the leadership rosters so you have options for how you want them displayed: a.) email addresses will be removed from the roster and replaced by converting the name to a hyperlink with a click-through to the email of the person; or b.) chapters will have the option of removing email functionality altogether from their leadership roster (this is done in site options).
3. Internal controls — again. Establish, and use, your internal controls. One chapter recently uncovered a fraudster by realizing that an email about sending funds to a bank account was not actually from the chapter president.

In summary

We all need to take a minute to question any request, instead of quickly responding, and establish policies now that can save your chapter later!



Prepare for career success — plan your 2018 training today.



WEBINARS
2 CPEs each

Jan.
10

Grants Management

Feb.
7

Understanding GASB's
New Standards on
Leases & Fiduciary
Activities

March
7

Infrastructure Financing
with State and Local
Government

March
28

Cybersecurity

Financial Systems Summit
Washington, DC | 6 CPEs



FSS
2018

Jan.
17

National Leadership Training
Washington, DC | 14 CPEs



NLT²⁰
18

Feb.
27-28

CFO/CIO Summit
Washington, DC | 6 CPEs



2018
CFO/CIO
Summit

May
1

April
11

Ethics

May
16

Fraud/Data Analytics

June
13

Leadership

Professional Development Training
Orlando, Fla. | 24 CPEs

PDT
2018

July
22-25

Internal Control &
Fraud Prevention Training
Washington, DC | 14 CPEs

**IC &
FPT 18**

Sept.
20-21

ARE YOU MOVING?

Please notify both your chapter and AGA National of your address change. Update your address online at the national website in the members' only area: www.agacgfm.org

SHARE YOUR NEWS

Please submit an article to the Newsletter Editor at radyojevich@danesherriff.com
Deadline for submission of articles is the 25th of the month.

If you ever come up with a topic or speaker you think the local AGA chapter should offer, let us know!!! We are always looking for ideas. (contact Mary Laufenberg, Education Chair, at maryendres6998@gmail.com)

Over the past couple of months, we were contacted with great some ideas. If we are able to locate a presenter, we will be offering some additional training over the program year. Keep watching our calendar of events for changes!

Calendar of Events 2017 – 2018

September 2016 – Board Meeting, to be determined
September 20, 2016 – Luncheon Meeting Topic -- Madison Metro Budget, Location
-- The Rigby Pub and Grill, 119 East Main Street, Madison, WI 53703

October 3, 2017 – Board Meeting, to be determined
October 26, 2017 – Luncheon Meeting Topic -- Madison Police Department will
discuss their budget and expenditures on police drones.

November 7, 2017 – Board Meeting
November 16, 2017 – Luncheon Meeting

December 2017 – No Board Meeting
December 6, 2017 – Audio Conference: Accounting and Financial Auditing
Challenges, location: WI Department of Transportation

January 9, 2018 – Board Meeting
January 25, 2018 – Luncheon Meeting, Annual Tax Update

February 6, 2018 – Board Meeting, to be determined
February 22, 2018 – Luncheon Meeting, topic and location to be determined

March 6, 2018 – Board Meeting, to be determined
March 28, 2018 – Audio Conference: Cybersecurity, location to be determined

April 3, 2018 – Board Meeting, to be determined
April 11, 2018 – Audio Conference: Beyond the Code: Ethics in the Real World,
location to be determined

May 2018 – Community Service Event – MS Walk – date and location to be
determined

May 1, 2018 – Board Meeting, to be determined
May 9, 2018 – Annual Spring Symposium, UW-Madison Union South

June 5, 2018 – Board Meeting, to be determined
June 13, 2018 – Audio Conference: Leadership, location to be determined

Note: Community service, VITA, and social events will be announced during the year.

*** subject to change as more detailed topic information becomes available***



Officers and Directors 2017 – 2018

President – Sherri Voigt, CGFM, CPA, DOT, sherriv@live.com, 608-266-2814

President Elect – Vacant

Immediate Past President – Mary Laufenberg, CGFM, CPA,
maryendres6998@gmail.com, 608-438-8338

Treasurer – Roger Birkett, CPA, jabirk100@yahoo.com

Historian – David Mellem, CGFM, CIA, CISA, US DHHS OIG, david.mellem@oig.hhs.gov,
608-264-5415 extension 25

Membership Chair – David Mellem, CGFM, CIA, CISA, US DHHS OIG,
david.mellem@oig.hhs.gov, 608-264-5415 extension 25

Newsletter Editor – Lillian Radivojevich, radivojevich@danesherriff.com, 608-284-4801

Education Chair – Mary Laufenberg, CGFM, CPA, fredmary6998@gmail.com, 608-438-
8338

Awards Chair – Vacant

Accountability Outreach Chair – Sherri Voigt, CGFM, CPA, DOT, sherriv@live.com, 608-
266-2814

Webmaster – Scott Thornton, sbthornton@gmail.com

Community Service Chair – Vacant

CGFM Chair – Vacant

Directors

- Lillian Radivojevich, radivojevich@danesherriff.com, 608-284-4801
- Roger Birkett, CPA, jabirk100@yahoo.com

Chapter Website – www.aga-wis.org

Chapter Address – PO Box 1454; Madison, WI 53701-1454