

## ABOUT OUR UPCOMING EVENTS

### February 10<sup>th</sup> Audio Conference In Santa Fe

**TOPIC:**  
*Understanding IT Audits for  
Program Managers and Auditors*

**Sponsor:** Human Services  
Department

12:00pm -2:00pm

Regulation & Licensing Department  
Tony Anaya Building, 2550 Cerrillos  
Rd

### February 16<sup>th</sup> Luncheon (Santa Fe)

**TOPIC:**  
Financial Abuse: Predatory  
Schemes Targeting Elders

**Speaker:**  
Mr. Robert Mead, State Law  
Librarian/Chief Financial Officer

**Place:**  
Del Charro

**Time:**  
11:45am-1:15pm

**Price:**  
\$15 for Members  
\$18 for Others

### February 18<sup>th</sup> Luncheon (Albuquerque)

**TOPIC:**  
ARRA reporting and touching on  
impact on single audit and the SEFA

**Speaker:**  
Jeff McWhorter, Audit Director at  
Accounting and Consulting Group

**Place:**  
St Clair Winery & Bistro

**Time:**  
11:30am-1:30pm  
**Price:**  
\$15 for Members and non-members

## President's Message



Greetings fellow AGAers!!!

I can't believe it is February already....Our program year is a little than half over, and we have already accomplished a great deal. As we look toward the following months, I know that we will accomplish even more. The Super Bowl is played in the month of February, however, sad to say my team is not playing in it this year.

The Chapter held its January monthly luncheon at the Cowgirl Hall of Fame on January 20<sup>th</sup>. The Executive Committee welcomed attendees as well as prospective AGA members. The luncheon was well attended and attendees were treated to a financial topic affecting each and every one of us public employees, PERA.

Our guest speaker this month was Mr. Oscar Arevalo. Mr. Arevalo is the Director/Chief Financial Officer with the Administrative Office of the Courts and serves as a PERA Board Member.

Mr. Arevalo shared with the audience the value of the fund of \$10.6 billion at the close of business on 11/30/09. I do recall last year's figure was approximately \$8 billion. This is a positive outlook going into the future, especially in these economic times when many other portfolios are showing major negative growth.

Our PERA Board has worked hard in accomplishing and maintaining the valuation of the fund and continues to strive toward positive growth of the fund. In saying that, Oscar spoke of one example where questions and statements are told to the companies that invest our money: what kind of company are we really investing in? Who are the company's key individuals and what is their experience? Is there major turnover within the company? If so, why? We want to be notified if another client dismisses them and why. We want to closely monitor the direction of the company. The Board continues to do their homework on all companies they are involved in.

Mr. Arevalo also spoke of a few proposed legislation that will be introduced during this year's Legislative Session that may affect current government employees as well as affecting future individuals anticipating entering the work force within the public sector.

*Presidents Letter Continued---*

Mr. Arevalo also spoke of a few initiatives the Board is undertaking as well as the System Solvency Task Force. It is interesting to know that it takes an 8% rate of return just to maintain the fund. The Executive Summary of PERAs June 30, 2009 Actuarial Valuation can be seen on our website at [www.agasantafe.org](http://www.agasantafe.org).

During the January luncheon, lunch was on us. In last month's newsletter we advertised if members brought a prospective member we would pick up their lunch. Well, six prospective members took us up on our offer. I hope to see them at future AGA functions, in addition, anticipate their addition to our Chapter's membership.

I would like to thank Mr. Arevalo for taking time out of his busy schedule to speak to our AGA group. As a government employee who contributes to PERA, it is comforting knowing we have well seasoned individuals like Oscar and the other PERA Board members who are determined in doing their due diligence in protecting the PERA funds.

I would like to invite interested individuals who would like to feature their own technical articles to be published in our newsletter as well as publicizing award recipients and special achievements of New Mexico Chapter members, please send them my way.

Hope to see all of you at our next luncheon, which will be at Del Charro. I hope you have a great rest of the month and don't forget to get something special for your Valentine!!!

*Bryan M. Maestas, CGFM*

*NM Chapter President*

*Southwest Regional Coordinator for Education*

---

## Membership



### ***Share the Magic!***

The 2009–2010 “***Share the Magic***” of Membership Member-Get-A-Member Campaign offers you the opportunity to win great prizes just for sharing the value of your AGA membership with your friends and colleagues and persuading them to join.

The campaign runs from May 1, 2009–April 30, 2010 and encourages current members to recruit new members. Because we are a membership-driven organization, an effective membership program must be an on-going, year-round process. The power of your organization is directly related to the commitment and active participation of your membership. It is essential that your Association aggressively recruit, retain and engage membership in the organization.

Since you already know the benefits of being an AGA member and have contacts in the financial management profession, this is a great way to increase AGA's membership, which in turn expands your own professional network and allows AGA to better meet your needs.

### **How to participate:**

It's easy! Request membership applications by e-mailing one of the Executive Committee members.

**What you can win:**

You only need to recruit 1 new member to win a prize! Better yet, recruit the most new members and win the grand prize of a complimentary registration to AGA's **2010 Professional Development Conference & Exposition** in Orlando, FL, and **two one-day passes to an Orlando theme park**. There are many opportunities to win prizes for you and your chapter. Please visit [www.agacgm.org](http://www.agacgm.org) for a complete list of prizes.

- M**M**embers sharing their experience.
- A**A**GA expanding its network of professionals.
- G**G**enerating more leadership opportunities.
- I**I**mproving accountability in financial management.
- C**C**ommitment to the future

Best of luck!  
And may the best recruiter win—for themselves and for AGA!

**HAPPY VALENTINES DAY!!**



**It's not early to plan!!!**

Mark your calendar and make plans to join us in sunny Orlando, Florida for AGA's 59<sup>th</sup> Annual Professional Development Conference & Exposition— *the* premier education and networking event for government financial managers and accountability professionals.

Worth 24 CPE hours, the conference covers the latest research and information about the American Recovery Act, the constantly changing rules and standards, new management techniques, technological advances and practical tips for bringing greater efficiency to government operations. The PDC offers a comprehensive program, captivating speakers, lively discussions, top-quality education sessions, and equips you with knowledge and skills you need to be more effective leader

**Registration & Housing Now Open for PDC** - It's time to start planning for next year's PDC. Join us July 11-14, 2010 in Orlando, FL to share best practices, gain useful information, see the latest technologies and get technical training from the top government financial management and accountability leaders and industry experts. The PDC offers unparalleled opportunities for networking, exchanging ideas, connecting with colleagues and meeting new friends.

**Register today!!!**

We will post the National PDC Agenda as soon as it is available to our local Chapter.

## LOCAL NEWS

### Albuquerque AGA New Member Recruiting Mixer

Thanks to everyone who attended our first AGA Winter Mixer, and thank you for bringing potential members to the event. We had a lovely evening of mingling, cocktails, and appetizers at the Bien Shur restaurant, with a beautiful view of the Sandias. Members of the Board were given the opportunity to speak in front of the group about themselves and express the great opportunities membership with AGA can provide.

The event was very successful, with about 30 people in attendance, half of which were potential members. Before the event was over, people were completing applications and there were applications still trickling in a couple days after event.

Again, we appreciate the time everyone took out of their busy schedules to learn more about our organization. We look forward to seeing more of you at our monthly luncheons and other AGA events!

~Laura Beltran-Schmitz, CPA, CFE

Early Careers Chair

lbeltran@meyners.com



## **CGFM NEWS**



### **ANNUAL CGFM RENEWAL TIME**

It is time to renew your CGFM designation and/or AGA membership! Below you'll find answers to frequently asked questions about CGFM renewal:

**Q:** How often do I have to renew my CGFM designation?

**A:** CGFM certification is renewed on an annual basis. The invoices are going out in February and the payment is due by March 31st. If you do not receive an invoice by the end of February, please call AGA at 1.800.AGA.7211.

**Q:** What are the requirements for maintaining the CGFM certification in an active status?

**A:** To maintain the CGFM certification in an active status, CGFMs are required to:

- Pay the CGFM renewal fee by the due date every year.
- Complete at least 80 hours of continuing professional education (CPE) every two years in government financial management topics or related technical subjects.
- Maintain and, if requested by AGA, provide detailed information on CPE hours completed.

**Q:** How do I determine my CPE cycle?

**A:** Your first two-year CPE cycle starts on January 1st of the year following the one when your CGFM was awarded (for example, if your CGFM was awarded in 2009, your first CPE cycle was 1/1/10-12/31/11). The award date is listed on your CGFM certificate. Your current CPE cycle is listed on your renewal invoice. For a table of all CPE cycles visit [www.agacgfm.org/cgfm/maintain/cgfm\\_calendar.aspx](http://www.agacgfm.org/cgfm/maintain/cgfm_calendar.aspx).

**Q:** My two-year CPE cycle just ended on December 31, 2009, but I did not complete 80 CPEs in 2008-2009. Can I make up the deficiency?

**A:** Yes. CGFMs who have not completed the 80 CPE hours in 2008-2009 cycle have until March 31, 2010 to make up the deficiency. Any CPE hours completed toward a deficiency in one period must be documented in the CPE records and may not be counted toward the requirements for the next two-year period. More information on CGFM CPE requirements can be found on [www.agacgfm.org/cgfm/maintain/cpe\\_requirements.aspx](http://www.agacgfm.org/cgfm/maintain/cpe_requirements.aspx).

**Q:** I just retired. Do I need to do anything to adjust my CGFM status to "retired"?

**A:** Yes. Individuals who have permanently retired AND are not working in the field of financial management can request an adjustment of their status to "retired" by contacting AGA's Office of Professional Certification (by mail or e-mail at [agacgfm@agacgfm.org](mailto:agacgfm@agacgfm.org) - please provide the date of retirement and confirm that since retiring you have not worked in the field of financial management). CGFMs in retired status are not required to remit the CGFM renewal fee or earn the 80 CPE hours, but must clearly indicate their retired status by using "CGFM-Retired" after their name and using "Retired" or "Retired status" on a resume, bio or other statements of qualification.

If retired CGFMs return to work in the field of financial management, they must contact AGA to change their status back to "active."

More information on CGFM renewal policies can be found on [www.agacgfm.org/cgfm/maintain/](http://www.agacgfm.org/cgfm/maintain/).

## Local Chapter Training



**February 10, 2010**  
*Understanding IT Audits  
for Program Managers  
and Auditors*  
Sponsor: Human Services  
Department

*Must e-mail Phillip Gonzales at  
[phillip.gonzales@state.nm.us](mailto:phillip.gonzales@state.nm.us) no later than noon  
on Monday, February 8th to receive electronic  
copy of course materials*

**March 3, 2010**  
*Fraud*  
Sponsor: New Mexico Supreme Court Law  
Library

**March 24, 2010**  
*Suggested Guidelines to Voluntary Reporting:  
Sharing the Government's Story Using Non-  
Financial Resources*  
Sponsor: SPONSOR NEEDED

**April 21, 2010**  
*The Latest Tools and Techniques for Auditors*  
Sponsor: SPONSOR NEEDED

**May 19, 2010**  
*Ethics*  
Sponsor: New Mexico Corrections Department

All audio conferences are scheduled 12:00 pm to  
2:00 pm. Please arrive by 11:45. They will be held  
at the Toney Anaya building located at 2550  
Cerrillos Road, Rio Grande room on the second  
floor.

**Prompt Arrival is Necessary**



We are looking for agencies that would like to sponsor one of the audio conferences listed above. The audio conferences have been a very successful educational tool in the past; in addition, provides free training to members and non-members at a very low cost to the agency as well as provides attendees 2 hours of continuing professional education. To reserve a sponsor slot, please contact, Phillip Gonzales at [phillip.gonzales@state.nm.us](mailto:phillip.gonzales@state.nm.us) or Bryan Maestas at [bryan.maestas@state.nm.us](mailto:bryan.maestas@state.nm.us).

## NEW on the Web!!!

Peter Pacheco, our Chapter's Webmaster and Newsletter Editor, has been doing some remodeling to our New Mexico Chapter's webpage. Please visit it at [www.agasantafe.org](http://www.agasantafe.org) and let us know what you think and please share your ideas. ALSO PLEASE TAKE A MINUTE TO TAKE THE ONLINE POLL IN REGARDS TO THE UPCOMING PDC. THANK YOU!

## **Have Lunch On Us!!!**

**Bring a prospective member to  
the February 16th Santa Fe luncheon  
and AGA will pick up the cost  
of the prospective member's lunch.**

**Please see one of the Executive  
Committee members during the luncheon  
so we can meet the prospective member  
and gather their contact information.**

**See you on the 16th!!!**

# FEBRUARY LUNCHEONS

## SANTA FE

### FEBRUARY LUNCHEON

Del Charro  
101 W Alameda St  
Santa Fe, NM

February 16, 2010, Tuesday  
11:45am – 1:15pm **1hr CPE Non-Technical**

**Speaker:** Mr. Robert Mead, State Law Librarian/Chief Financial Officer  
**Topic:** Financial Abuse: Predatory Schemes Targeting Elders  
**Cost:** \$15 Members & \$18 non-members

#### MENU

##### **Del Charro Burger**

Fresh Ground Beef served French Fries  
Add one of the following at no extra cost: Bacon, Cheddar, Green Chile or Guacamole

##### **House Chicken Sandwich**

Grilled Chicken Breast with House BBQ Sauce served French Fries, Add one of the following at no extra cost: Bacon, Cheddar, Green Chile or Guacamole

##### **Santa Fe Tostada**

Mixed Greens topped with Salmon Cheese, Olives, Pico de Gallo, Pepperocini and Avocado. Lemon Thyme or Ranch Dressing

Includes non-alcoholic beverages and Chef's Choice Desserts

R.S.V.P. Wanda Gonzales by 12:00 by February 15<sup>th</sup> at 827-4865 or by [emailsupwmg@nmcourts.gov](mailto:emailsupwmg@nmcourts.gov)

Cancellations after the deadline and “no shows will be charged the full price of the meal payable to the Chapter. We must guarantee the number of attendees to the restaurant in advance.

RVSP's are needed

## ALBUQUERQUE

### FEBRUARY LUNCHEON

St Clair Winery & Bistro  
901 Rio Grande Blvd. N.W.  
Ste. B-100  
Albuquerque, NM 87104  
**Phone:** (505) 243-9916

February 18<sup>th</sup>, 2010  
Thursday 11:30am – 1:30pm

**Cost:** \$15, includes lunch

**Speaker:** Jeff McWhorter, Audit Director at Accounting and Consulting Group

**Topic:** ARRA reporting and touching on impact on single audit and the SEFA

Register by 3:30 pm on 2/15/10 by calling Marla Gorena at 505.222.3510 or e-mail [mgorena@meyners.com](mailto:mgorena@meyners.com).

**Lunch**  
&  
**Learn**

Introducing the AGA Winter Series  
The **AGA Winter Series** is a series of three classes offered in four locations throughout New Mexico. These classes are *taught by senior members of the AGA Albuquerque Board* and are designed to accentuate a government accountant's skill set to perform better year round. For more information including registration information, please click here. <http://agasantafe.org/> or at <http://www.agaalbuquerque.org/>

## **Wanted: Citizen-Centric Report (CCR) Reviewers**

AGA offers a Certificate of Excellence in Citizen-Centric Reporting for entities that prepare and distribute high-quality Citizen-Centric Reports. To be eligible for the certificate, governments must incorporate into their report the program's high standards of content, visual appeal, readability, distribution and timeliness in reporting.

The number of reports that we are receiving is steadily increasing and therefore we are looking for additional members to serve as volunteer reviewers of Citizen reports that are submitted for the **Certificate of Excellence in Citizen-Centric Reporting**.

➤ *What Do Reviewers Do?*

Volunteer reviewers read four-page Citizen-Centric reports, evaluate them using AGA's judging guidelines and respond with recommendations for report improvements. Each report gets reviewed by three volunteer reviewers. Reviewers decide whether the report they have judged merits the Certificate of Excellence.

➤ *What is the Time Commitment?*

On average, reviewing/judging a report takes approximately one to two hours and it is all done electronically. More than likely, each reviewer will review one report a month.

Your help is needed! Please volunteer today! If you are interested, please contact Susan Fritzlen at the AGA National Office at 1-800-242-7211.

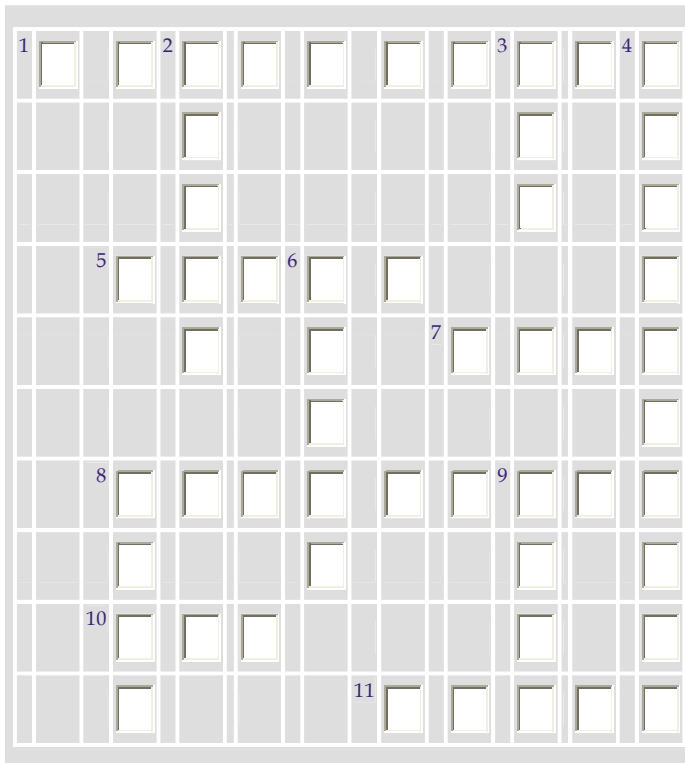
## **Grants Management Training Available**

Are you receiving ARRA grant funds and struggling with the accounting and financial requirements? AGA's onsite Grants Management training course may help! This course provides a general overview of grants management, including preparation, review and submittal of proposals; negotiation and acceptance of grants; post-award financial and administrative management; closeout and audit; and relevant compliance issues.

For more details about Grants Management and all other AGA-sponsored training courses, including pricing and availability, please contact Joe Jozefczyk at 1-800-242-7211, ext. 307, or Lynn Hoffman 1-800-242-7211, ext. 342.



Here is a Valentine Crossword to help you start thinking about Valentine's Day



**Across**

- 1. Cards and gifts exchanged on February 14th.
- 5. Main body organ that pumps blood.
- 7. A small arrow.
- 8. Brown candy made from butter sugar and cocoa.
- 10. The color used for Valentines.
- 11. Fortune telling cards.

**Down**

- 2. Person you love.
- 3. Opposite of old.
- 4. Someone you like a lot.
- 6. Almond \_\_\_\_.
- 8. Valentine's day \_\_\_\_.
- 9. Italian for "love".

New Mexico Chapter Treasurer's report by Blanca Sena

**November 2009**

Beginning Balance	11/01/09	\$ 25,520.97
Add: Deposits		\$ 861.00
Less: Checks Written		\$ (2,650.55)
Ending Balance	11/30/09	<b><u><u>\$23,731.42</u></u></b>

**REMINDERS:**

**Renewal Dates**

**AGA Member renewal Year:**

April - March 31. Members renewal season is right around the corner !!

**CGFM Renewal Year:**

January - December 31

**LOCAL ANNUAL PDC**

**THE DATE HAS BEEN SET!!!**

The Professional Development Conference will be held in Albuquerque at the Sandia Resort on April 13 & 14 2010. Updated information regarding the PDC will continually be updated on our website at [www.agasantafe.org](http://www.agasantafe.org) as it becomes available.

**Solution to Crossword:**

**Across:**

1. Valentines
5. Heart
7. Dart
8. Chocolate
10. Red
11. Tarot

**Down:**

2. Lover
3. New
4. Sweetheart
6. Rocca
8. Card
9. Amor

# AGA New Mexico Chapter 2009-2010 Officers and Directors

Chapter President  
Bryan Maestas  
NM Corrections Department  
827-8603  
[bryan.Maestas@state.nm.us](mailto:bryan.Maestas@state.nm.us)

Chapter Past President  
Linda Medina  
Retired,  
[lm6medina@yahoo.com](mailto:lm6medina@yahoo.com)

Chapter President Elect  
James Chadburn  
State Auditor's Office  
476-3800  
[james.chadburn@osa.state.nm.us](mailto:james.chadburn@osa.state.nm.us)

Chapter Vice President  
Wanda Gonzales  
Supreme Court  
827-4865  
[supwmq@nmcourts.com](mailto:supwmq@nmcourts.com)

Chapter Treasurer  
Blanca Trujillo  
State Auditor's Office  
476-3834  
[blancat@osa.state.nm.us](mailto:blancat@osa.state.nm.us)

Chapter Webmaster/News Letter  
Editor  
Peter Pacheco  
City Of Albuquerque  
768-3190  
[ppacheco@cabq.gov](mailto:ppacheco@cabq.gov)

Chapter Community Service  
Sylvia Barela  
Legislative Finance Committee  
986-4577  
[sylvia.barela@nmlegis.gov](mailto:sylvia.barela@nmlegis.gov)

Chapter CGFM Coordinator  
Vince Lithgow  
CYFD  
827-8004  
[vince.lithgow1@state.nm.us](mailto:vince.lithgow1@state.nm.us)

Chapter Historian  
John Block  
Governor's Committee on  
Disability  
476-0418  
[john.block@state.nm.us](mailto:john.block@state.nm.us)

Chapter Education  
Phillip Gonzales  
DFA  
476-4515  
[phillip.gonzales@state.nm.us](mailto:phillip.gonzales@state.nm.us)

Chapter Early Career  
Daniel Martinez  
DFA  
827-5074  
[danielb.martinez@state.nm.us](mailto:danielb.martinez@state.nm.us)

Chapter Membership  
Elena Tercero  
DFA  
827-3882  
[elena.tercero@state.nm.us](mailto:elena.tercero@state.nm.us)

Chapter Chair Person  
Dina Advani  
NM Higher Education Department  
476-6509  
[dina.advani@state.nm.us](mailto:dina.advani@state.nm.us)



Association  
of Government  
Accountants

P.O. 22936  
Santa Fe, New Mexico  
87502

[agasantafe@aol.com](mailto:agasantafe@aol.com)  
[www.agasantafe.org](http://www.agasantafe.org)

