



**Florida Government Finance Officers Association, Inc
Meeting of the Board of Directors**

Tuesday, February 10, 2026

Microsoft Teams

11:00 am



FGFOA Mission

2024-2025

The FGFOA is dedicated to being your professional resource by providing opportunities through Networking, Education, Information and Leadership.

Networking

- Promoting relationships among peers
- Cultivating strong relationships with other organizations
- Enhancing relationships with the Local Chapters

Education

- Creating balanced and cost-effective educational programs
- Utilizing various methods of delivery
- Enhancing cooperative training partnerships
- Promoting attainment and retention of certified officials

Information

- Delivering information through innovation
- Providing feedback and analysis on emerging legislative and technical issues
- Facilitating information sharing for members

Leadership

- Providing opportunities for individual development
- Recognition of the FGFOA's governmental finance expertise
- Recruiting, mentoring and promoting leaders within our organization
- Recognizing member achievements



**ATTENDANCE
FGFOA BOARD MEETING
February 10, 2026**

**NOT
PRESENT**

PRESENT

OFFICERS

Nicole Gasparri	President
Kelly Strickland	President-Elect
Melissa Burns	Secretary/Treasurer

DIRECTORS

1st Term

2nd Term

Sharon Almeida	2023-2026	
Nicole Jovanovski	2022-2025	2025-2028
Missy Licourt	2021-2024	2024-2027
Anna Otiniano	2024-2027	
William Spinelli	2025-2026	
Allison Teslia	2024-2027	
Stephen Timberlake	2025-2028	
Vacant		

IMMEDIATE PAST PRESIDENT

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Rip Colvin



FGFOA BOARD OF DIRECTORS TABLE OF CONTENTS

DATE/TIME: **Tuesday, February 10, 2026**
 11:00 am
 Microsoft Teams

- I. Call to Order – Nicole Gasparri, President**
- II. Attendance**
- III. Report of Officers**
 - A. President – Nicole Gasparri**
 - 1. Nominating Committee**
 - 2. Lifetime Achievement Award Committee Selection**
 - B. President Elect – Kelly Strickland**
 - 1. 2026-2027 Committee Chair Selection**
 - C. Secretary Treasurer – Melissa Burns**
 - 1. Financial Statements Ending June 30, 2025**
- IV. Executive Director – Paul Shamoun**
- V. Annual Conference Program**
- VI. Other Business**
- VII. Next Meeting – Friday, April 17, 2026, in conjunction with 2026 Leadership at the Embassy Suites by Hilton Orlando, 8978 International Drive.**



FLORIDA GOVERNMENT FINANCE OFFICERS ASSOCIATION, INC.
2025-2026 Board of Directors
President Agenda Item

**2025-2026
BOARD OF DIRECTORS**

OFFICERS

President

Nicole Gasparri

President-Elect

Kelly Strickland

Secretary/Treasurer

Melissa Burns

DIRECTORS

Sharon Almeida

Nicole Jovanovski

Melissa Licourt

Anna Otiniano

Sarah Simpson

William Spinelli

Allison Teslia

Stephen Timberlake

PAST PRESIDENT

Rip Colvin

EXECUTIVE DIRECTOR

Paul Shamoun

Meeting Date: February 10, 2026

Title of Item: Nominating Committee Report

Executive Summary, Explanation or Background:

Due to the resignation of Board Member Rebecca Schnirman, a vacancy was created. The Nominating Committee met to discuss the process and solicited nominations. The Nominating Committee met on January 22, 2026, and after reviewing the application, the committee is recommending Sarah Simpson, Budget Manager, City of Aventura to fill the open seat for the remainder of the 2025-2026 fiscal year.

Recommended Action:

For review and approval

Nicole Gasparri

**Nicole Gasparri,
FGFOA President**

February 5, 2026

Date



FLORIDA GOVERNMENT FINANCE OFFICERS ASSOCIATION, INC.
2025-2026 Board of Directors
President Agenda Item

**2025-2026
BOARD OF DIRECTORS**

OFFICERS

President

Nicole Gasparri

President-Elect

Kelly Strickland

Secretary/Treasurer

Melissa Burns

DIRECTORS

Sharon Almeida

Nicole Jovanovski

Melissa Licourt

Anna Otiniano

Sarah Simpson

William Spinelli

Allison Teslia

Stephen Timberlake

PAST PRESIDENT

Rip Colvin

EXECUTIVE DIRECTOR

Paul Shamoun

Meeting Date: February 10, 2026

Title of Item: Lifetime Achievement Award Committee
Selection

Executive Summary, Explanation or Background:

Below are my choices for the 2026 Lifetime Achievement
Committee:

Chair: Nicole Gasparri, Chief Administrative Officer, Clerk of the
Circuit Court & Comptroller, Palm Beach County

Officer: Kelly Strickland, Director of Financial Administration,
City of Sarasota

Members:

Diane Riechard, Retired

Linda Davidson, Retired

Sharon Almedia, Finance Director, Village of Royal Palm Beach

Diane Martinez, Chief Financial Officer, Escambia County -
Housing Finance Authority

Recommended Action:

For review and approval

Nicole Gasparri _____

January 30, 2026

**Nicole Gasparri,
FGFOA President**

Date



FLORIDA GOVERNMENT FINANCE OFFICERS ASSOCIATION, INC.
2025-2026 Board of Directors
President-Elect Agenda Item

2025-2026
BOARD OF DIRECTORS
OFFICERS
President
 Nicole Gasparri

President-Elect
 Kelly Strickland

Secretary/Treasurer
 Melissa Burns

DIRECTORS
 Sharon Almeida

Nicole Jovanovski

Melissa Licourt

Anna Otiniano

Sarah Simpson

William Spinelli

Allison Tesla

Stephen Timberlake

PAST PRESIDENT
 Rip Colvin

EXECUTIVE DIRECTOR
 Paul Shamoun

Meeting Date: February 10, 2026

Title of Item: 2026-2027 Committee Chair Selection

Executive Summary, Explanation or Background:

It is my pleasure to present the Committee Chairs I have chosen for my year as President of the FGFOA.

Jonathan McKinney	Certification Committee
Ben Salz	Conference Program Committee
Wayne Meyer	Educational Programs Committee
Tameka Blake	Event Host Committee
Jamie Roberson	Local Chapter Committee
Kadem Ramirez	Professional Development Committee
Elizabeth Walter	SOGF Committee
To Be Decided	Technical and Legislative Resources Committee

Recommended Action:

For review and approval.

Kelly Strickland

January 29, 2026

Kelly Strickland,
FGFOA President-Elect

Date



FLORIDA GOVERNMENT FINANCE OFFICERS ASSOCIATION, INC.
2025-2026 Board of Directors
Secretary-Treasurer Agenda Item

2025-2026
BOARD OF DIRECTORS
OFFICERS
President
Nicole Gasparri

President-Elect
Kelly Strickland

Secretary/Treasurer
Melissa Burns

DIRECTORS
Sharon Almeida

Nicole Jovanovski

Melissa Licourt

Anna Otiniano

Sarah Simpson

William Spinelli

Allison Tesla

Stephen Timberlake

PAST PRESIDENT
Rip Colvin

EXECUTIVE DIRECTOR
Paul Shamoun

Meeting Date: February 10, 2026

Title of Item: Financials Ending June 30, 2025

Executive Summary, Explanation or Background:

Attached are the FGFOA Financials for the period ending June 30, 2025.

Recommended Action:

For review and approval

Melissa Burns

January 29, 2026

Melissa Burns,
FGFOA Secretary-Treasurer

Date

FLORIDA GOVERNMENT FINANCE
OFFICERS ASSOCIATION, INC.

FINANCIAL STATEMENTS

JUNE 30, 2025 AND 2024

Florida Government Finance Officers Association, Inc.
Financial Statements
June 30, 2025 and 2024

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MICHAEL H. BROSS, C.P.A.
MARINA CUNNINGHAM, C.P.A.

January 14, 2026

Independent Auditor's Report

To the Board of Directors of the
Florida Government Finance
Officers Association, Inc.:

Opinion

We have audited the accompanying financial statements of the Florida Government Finance Officers Association, Inc. (a nonprofit organization), which comprise the statements of financial position as of June 30, 2025 and 2024, and the related statements of activities and cash flows for the years then ended, and the related notes to the financial statements.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the Florida Government Finance Officers Association, Inc. as of June 30, 2025 and 2024, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the Florida Government Finance Officers Association, Inc. and to meet our other ethical responsibilities in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Florida Government Finance Officers Association, Inc.'s ability to continue as a going concern within one year after the date that the financial statements are available to be issued.

Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with generally accepted auditing standards, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Florida Government Finance Officers Association, Inc.'s internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the Florida Government Finance Officers Association, Inc.'s ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control related matters that we identified during the audit.

Sherstein + Sherstein, P.A.

Florida Government Finance Officers Association, Inc.

*STATEMENTS OF FINANCIAL POSITION

June 30, 2025 and 2024

ASSETS

	<u>2025</u>	<u>2024</u>
<u>Current Assets</u>		
Cash and Cash Equivalents	\$ 824,104	\$ 730,183
Investments	-	261,070
Accounts Receivable	9,840	4,750
Miscellaneous Receivables	11,545	43,955
Deposits	31,000	7,500
Prepaid Expenses	5,002	6,469
Total Current Assets	<u>881,491</u>	<u>1,053,927</u>
 Total Assets	 <u>\$ 881,491</u>	 <u>\$ 1,053,927</u>

LIABILITIES AND NET ASSETS

<u>Current Liabilities</u>		
Accounts Payable	\$ 748,669	\$ 847,798
Deferred Revenues	140	-
Total Current Liabilities	<u>748,809</u>	<u>847,798</u>
 <u>Net Assets Without Donor Restrictions</u>	 <u>132,682</u>	 <u>206,129</u>
 Total Liabilities and Net Assets	 <u>\$ 881,491</u>	 <u>\$ 1,053,927</u>

*The accompanying notes are an integral part of these financial statements.

Florida Government Finance Officers Association, Inc.
*STATEMENTS OF ACTIVITIES
For the Years Ended June 30, 2025 and 2024

	Year Ended June 30, 2025	Year Ended June 30, 2024
<u>Revenues</u>		
Membership Dues	\$ 265,595	\$ 234,695
Conference Revenue	796,883	747,879
School of Governmental Finance	126,430	98,057
Seminars	54,200	40,250
Investment Income	8,924	9,083
Leadership FGFOA	28,405	20,895
Other Programs (CGFO, Boot Camps, Divergent)	117,058	128,725
Miscellaneous Income	25	-
Total Revenues	1,397,520	1,279,584
 <u>Expenses</u>		
Conference Expenses	820,628	909,975
School of Governmental Finance	163,543	145,209
Seminars	46,055	43,458
Leadership FGFOA	61,282	67,758
Other Programs (CGFO, Boot Camps, Divergent)	226,779	158,446
Management and General	152,680	138,857
Total Expenses	1,470,967	1,463,703
 <u>(Decrease) in Net Assets Without Donor Restrictions</u>	(73,447)	(184,119)
 <u>Net Assets Without Donor Restrictions, Beginning of Year</u>	206,129	390,248
 <u>Net Assets Without Donor Restrictions, End of Year</u>	\$ 132,682	\$ 206,129

*The accompanying notes are an integral part of these financial statements.

Florida Government Finance Officers Association, Inc.
*STATEMENTS OF CASH FLOWS
For the Years Ended June 30, 2025 and 2024

	<u>Year Ended June 30, 2025</u>	<u>Year Ended June 30, 2024</u>
<u>Cash Flows from Operating Activities</u>		
Receipts from Members and Associates	\$ 1,092,698	\$ 924,966
Receipts from Exhibitors and Hotel Sites	323,358	304,761
Interest and Dividends	8,924	9,082
Fees Paid to Florida League of Cities, Inc.	(226,380)	(176,100)
Payments to Vendors	<u>(1,365,749)</u>	<u>(1,183,895)</u>
Net Cash (Used) by Operating Activities	<u>(167,149)</u>	<u>(121,186)</u>
 <u>Cash Flows from Investing Activities</u>		
Proceeds from Redemption of Certificates of Deposit	261,070	258,415
Investment in Certificates of Deposit	<u>-</u>	<u>(266,558)</u>
Net Cash Provided (Used) by Investing Activities	<u>261,070</u>	<u>(8,143)</u>
<u>Net Increase (Decrease) in Cash and Cash Equivalents</u>	93,921	(129,329)
<u>Cash and Cash Equivalents, Beginning of Year</u>	<u>730,183</u>	<u>859,512</u>
<u>Cash and Cash Equivalents, End of Year</u>	<u>\$ 824,104</u>	<u>\$ 730,183</u>

*The accompanying notes are an integral part of these financial statements.

Florida Government Finance Officers Association, Inc.
NOTES TO FINANCIAL STATEMENTS
June 30, 2025 and 2024

Note 1 – Organization and Significant Accounting Policies

- A. The Florida Government Finance Officers Association, Inc. (Association) is an organization whose purpose is to promote the improvement of government financial administration in Florida.
- B. The preparation of financial statements in conformity with generally accepted accounting principles requires management to make estimates and assumptions that affect certain reported amounts and disclosures. Accordingly, actual results could differ from those estimates.
- C. Revenues and expenses are recorded on the accrual basis.
- D. The costs of providing various programs and other activities have been summarized on a functional basis in the statements of activities. Accordingly, certain costs have been allocated among the programs and supporting services benefited.
- E. The Association reports donor-restricted contributions whose restrictions are met in the same reporting period as unrestricted program revenue.
- F. The Association is exempt from federal income taxes under Section 501(c)(6) of the Internal Revenue Code except on net income derived from unrelated business activities.
- G. The Association considers all highly liquid debt instruments purchased with a maturity of three months or less to be cash equivalents.
- H. The Association maintains a portion of its cash and cash equivalents in bank deposit accounts which, at times, may exceed federally insured limits. The amount on deposit in excess of federally insured limits was approximately \$408,000 at June 30, 2025 and \$487,000 at June 30, 2024. Additionally, approximately \$171,300 was invested in a money market account at June 30, 2025 and \$18,300 at June 30, 2024, which is not insured. The Association has not experienced any losses in such accounts and believes it is not exposed to any significant credit risk with respect to cash and cash equivalents.
- I. Association policy established by the Board of Directors requires that net assets be maintained at a minimum level equal to twice the average monthly operating expenses for the prior three-year period.
- J. Certain accounts in the prior-year financial statements have been reclassified for comparative purposes to conform with the presentation in the current-year financial statements.
- K. Management has evaluated subsequent events through January 14, 2026, the date the financial statements were available to be issued.

Florida Government Finance Officers Association, Inc.
NOTES TO FINANCIAL STATEMENTS
June 30, 2025 and 2024

Note 2 – Investments

The Association held no certificate of deposit as of June 30, 2025 and one as of June 30, 2024. The interest rate for the certificate held at June 30, 2024 was 2.87%. The certificate held at June 30, 2024 matured on February 20, 2025.

These certificates of deposit are not *securities* as defined by current financial accounting standards; therefore, the disclosures about fair-value measurements are not applicable. They are valued at cost plus accrued interest, which approximates fair value due to their relatively short terms.

Investment income is summarized as follows:

	2025	2024
Interest Income	\$ 5,993	\$ 8,143
Dividend Income	2,931	940
Total	\$ 8,924	\$ 9,083

Note 3 – Revenue Recognition

Payment of fees for the Association’s conference and educational/developmental programs is generally required at the time of registration although in some cases the fees are billed when due, resulting in accounts receivable. The Association recognizes revenue when the events have been completed. Payment of membership dues is required at the beginning of the membership period, which is the fiscal year, and dues revenue is recognized ratably over the same period, since the benefits to Association members are consistent throughout the year. Amounts received in advance are deferred to the applicable periods, resulting in contract liabilities. Beginning and ending balances from these transactions with members are presented on the statements of financial position as accounts receivable and deferred revenues.

Substantially all revenue relates to activities of Association members who are financial professionals serving Florida municipalities, providing stability with respect to the nature, amount and timing of revenue and cash flows.

The beginning and ending contract balances were as follows:

	June 30,		
	2025	2024	2023
Accounts Receivable	\$ 9,840	\$ 4,750	\$ 7,630
Deferred Revenues	\$ 140	\$ -	\$ -

Florida Government Finance Officers Association, Inc.
NOTES TO FINANCIAL STATEMENTS
June 30, 2025 and 2024

Note 4 – Administrative Fees

The Association engages the Florida League of Cities, Inc. (FLC) to provide administrative services for an annual fee plus reimbursement of certain out-of-pocket expenses. The fee arrangement is based on a fee of \$187,000 for the year ended June 30, 2025, with an annual increase of 3% for the next two years.

Effective July 1, 2025, the Association entered into a new association management services agreement with FLC. The agreement is for a 12-month term but will automatically renew unless or until the agreement is terminated by either party. The fee arrangement is based on a fee of \$232,317 for the year ended June 30, 2026, with an annual increase of 3% for the next four years.

Administrative fees of \$187,000 and \$137,000 were incurred during the years ended June 30, 2025 and 2024, respectively.

Accounts payable at June 30, 2025 and 2024 included \$702,677 and \$841,297, respectively, in fees and expense reimbursements due to FLC.

Note 5 – Meeting Management Fees

The Association engaged FLC to provide meeting management services for the Annual Conference, School of Governmental Finance (SOGF) and Leadership FGFOA Conference, for fees based on the number of registrants. The contract also provides for reimbursement to FLC for certain out-of-pocket expenses. Fees for meeting management services of \$38,530 and \$39,300 were incurred for the years ended June 30, 2025 and 2024, respectively.

Effective July 1, 2025, the fees for all meeting management services provided by FLC are included within the new association management services agreement with FLC as discussed in Note 4.

Florida Government Finance Officers Association, Inc.
NOTES TO FINANCIAL STATEMENTS
June 30, 2025 and 2024

Note 6 – Liquidity and Availability of Financial Assets

As part of the Association's liquidity management, it has a policy to structure its financial assets to be available as its general expenditures, liabilities, and other obligations come due. In addition, the Association invests cash in excess of immediate requirements in a money-market account.

The Association's governing board has designated, from net assets without donor restrictions, a minimum liquidity reserve of approximately \$229,085 as of June 30, 2025. As of June 30, 2025, the net assets without donor restrictions balance was \$132,682. The governing board has approved an amended budget for the year ending June 30, 2026 that is expected to increase net assets by \$95,150, aimed at restoring the net asset amount to the minimum reserve balance.

The Association's financial assets available for general expenditures within one year of the statement of financial position date are as follows:

Cash and cash equivalents	\$ 824,104
Receivables	<u>21,385</u>
Financial assets at year-end	845,489
Board-designated liquidity reserve	<u>(229,085)</u>
Financial assets available for general expenditures within one year	<u><u>\$ 616,404</u></u>

Florida Government Finance Officers Association, Inc.
NOTES TO FINANCIAL STATEMENTS
June 30, 2025 and 2024

Note 7 – Allocation of Expenses

The tables below present expenses by both their nature and their function for June 30, 2025 and 2024:

June 30, 2025	Program Activities					Supporting Activities			Total Expenses
	Annual Conference	SOGF	Seminars	Leadership	Other Programs	Program Subtotal	Mgmt and General	Supporting Subtotal	
Administration Fees	\$ -	\$ -	\$ -	\$ -	\$ 93,500	\$ 93,500	\$ 93,500	\$ 93,500	\$ 187,000
Pre-Conference Expenses	-	-	33,430	-	-	33,430	-	-	33,430
Bank Fees	21,055	21,055	-	-	-	42,110	21,055	21,055	63,165
CGFO Program	-	-	-	-	21,951	21,951	-	-	21,951
GFOA Conference	-	-	-	-	13,775	13,775	-	-	13,775
Meeting Expenses	13,608	13,608	-	-	7,528	34,744	27,523	27,523	62,267
Office and Administrative Expenses	-	-	-	-	2,858	2,858	5,445	5,445	8,303
School of Governmental Finance	-	124,130	-	-	-	124,130	-	-	124,130
Annual Conference	781,215	-	-	-	-	781,215	-	-	781,215
Auditor Fee	4,750	4,750	-	-	-	9,500	4,750	4,750	14,250
Leadership Conference	-	-	-	61,282	-	61,282	-	-	61,282
Boot Camp Conference	-	-	-	-	87,167	87,167	-	-	87,167
Ethics Classes	-	-	12,625	-	-	12,625	-	-	12,625
Travel	-	-	-	-	-	-	407	407	407
Total Expenses	\$820,628	\$163,543	\$ 46,055	\$ 61,282	\$226,779	\$ 1,318,287	\$152,680	\$152,680	\$ 1,470,967

Florida Government Finance Officers Association, Inc.
NOTES TO FINANCIAL STATEMENTS
June 30, 2025 and 2024

Note 7 – Allocation of Expenses (Continued)

June 30, 2024

	Program Activities					Supporting Activities		Total Expenses	
	Annual Conference	SOGF	Seminars	Leadership	Other Programs	Program Subtotal	Mgmt and General		Supporting Subtotal
Administration Fees	\$ -	\$ -	\$ -	\$ -	\$ 68,500	\$ 68,500	\$ 68,500	\$ 68,500	\$ 137,000
Pre-Conference Expenses	-	-	34,248	-	-	34,248	-	-	34,248
Bank Fees	14,689	14,689	-	-	-	29,378	14,689	14,689	44,067
CGFO Program	-	-	-	-	12,662	12,662	-	-	12,662
GFOA Conference	-	-	-	-	8,177	8,177	-	-	8,177
Meeting Expenses	16,540	16,540	-	-	6,179	39,259	41,052	41,052	80,311
Office and Administrative Expenses	-	-	-	-	5,284	5,284	9,537	9,537	14,821
School of Governmental Finance	-	109,880	-	-	-	109,880	-	-	109,880
Annual Conference	874,646	-	-	-	-	874,646	-	-	874,646
Auditor Fee	4,100	4,100	-	-	-	8,200	4,100	4,100	12,300
Leadership Conference	-	-	-	67,758	-	67,758	-	-	67,758
Boot Camp Conference	-	-	-	-	57,644	57,644	-	-	57,644
Ethics Classes	-	-	9,210	-	-	9,210	-	-	9,210
Travel	-	-	-	-	-	-	979	979	979
Total Expenses	\$909,975	\$145,209	\$ 43,458	\$ 67,758	\$158,446	\$ 1,324,846	\$138,857	\$138,857	\$ 1,463,703

The financial statements report certain categories of expenses that are attributable to more than one program or supporting function. Therefore, these expenses require allocation on a reasonable basis that is consistently applied. The expenses that are allocated include bank fees, administration fees, meeting expenses, office and administrative expenses and auditor fees. The allocation is based on the estimated percentage of each shared expense utilized for the respective functional category.

SHORSTEIN & SHORSTEIN, P.A.

CERTIFIED PUBLIC ACCOUNTANTS

8265 BAYBERRY ROAD

JACKSONVILLE, FLORIDA 32256

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MARINA CUNNINGHAM, C.P.A.

January 14, 2026

To the Audit Committee of the Florida
Government Finance Officers Association, Inc.

We have audited the financial statements of the Florida Government Finance Officers Association, Inc. for the years ended June 30, 2025 and 2024, and have issued our report thereon dated January 14, 2026. Professional standards require that we provide you with the following information related to our audits.

Our Responsibility Under U.S. Generally Accepted Auditing Standards

As stated in our engagement letter dated July 8, 2025, our responsibility, as described by professional standards, is to express an opinion about whether the financial statements prepared by management with your oversight are fairly presented, in all material respects, in conformity with U.S. generally accepted accounting principles. Our audits of the financial statements do not relieve you or management of your responsibilities.

Planned Scope and Timing of the Audits

We performed the audits according to the planned scope and timing previously communicated to you.

Significant Audit Findings

Qualitative Aspects of Accounting Practices

Management is responsible for the selection and use of appropriate accounting policies. The significant accounting policies used by the Florida Government Finance Officers Association, Inc. are described in Note 1 to the financial statements. No new accounting policies were adopted during the current year and the application of existing policies was not changed during the years ended June 30, 2025 and 2024. We noted no transactions entered into by the Association during either year for which there is a lack of authoritative guidance or consensus. All significant transactions have been recognized in the financial statements in the proper period.

Accounting estimates are an integral part of the financial statements prepared by management and are based on management's knowledge and experience about past and current events and assumptions about future events. Certain accounting estimates are particularly sensitive because of their significance to the financial statements and because of the possibility that future events affecting them may differ significantly from those expected.

The disclosures in the financial statements are neutral, consistent and clear.

Difficulties Encountered in Performing the Audits

We encountered no significant difficulties in dealing with management in performing and completing our audits.

Audit Committee of the Florida Government
Finance Officers Association, Inc.
January 14, 2026
Page Two

Corrected and Uncorrected Misstatements

Professional standards require us to accumulate all known and likely misstatements identified during the audits, other than those that are trivial, and communicate them to the appropriate level of management. No such misstatements were identified.

Disagreements with Management

For purposes of this letter, professional standards define a disagreement with management as a financial accounting, reporting or auditing matter, whether or not resolved to our satisfaction, that could be significant to the financial statements or the auditor's report. We are pleased to report that no such disagreements arose during the course of our audits.

Management Representations

We have requested certain representations from management that are included in the management representation letter dated January 14, 2026.

Management Consultations with Other Independent Accountants

In some cases, management may decide to consult with other accountants about auditing and accounting matters, similar to obtaining a "second opinion" on certain situations. If a consultation involves application of an accounting principle to the Association's financial statements or a determination of the type of auditor's opinion that may be expressed on those statements, our professional standards require the consulting accountant to check with us to determine that the consultant has all the relevant facts. To our knowledge, there were no such consultations with other accountants.

Other Audit Findings or Issues

We generally discuss a variety of matters, including the application of accounting principles and auditing standards, with management each year prior to retention as the Association's auditors. However, these discussions occurred in the normal course of our professional relationship, and our responses were not a condition to our retention.

This information is intended solely for the use of the Audit Committee and management of the Florida Government Finance Officers Association, Inc. and is not intended to be and should not be used by anyone other than these specified parties.

Sincerely,

Shuster + Shuster, P.A.



**FLORIDA GOVERNMENT FINANCE OFFICERS ASSOCIATION, INC.
2025-2026 Conference Program Committee
Agenda Item**

2025-2026

CHAIRPERSON

Sarah Simpson

Budget Manager

City of Aventura

19200 W Country Club Drive

Aventura, FL 33180-2403

(305) 466-8951

simpsons@cityofaventura.com

BOARD LIAISON

Anna Otiniano

COMMITTEE CO-CHAIR

Ben Salz

STAFF LIAISON

Jill Walker

Meeting Date: February 10, 2026

Title of Item: 2026 Annual Conference Program Draft

Executive Summary, Explanation or Background:

The Annual Conference Program Committee has been working hard and is excited to present the attached program draft for the Board's review.

Content: The schedule of the annual conference is presented by date, time and track.

Recommended Action: The Board review the current schedule and provide any suggestions and/or guidance regarding the class offerings.

Sarah Simpson

2/3/26

**Sarah Simpson,
Conference Program Committee Chair**

Date

2026 FGFOA Conference Program
June 13-17, 2026 | Lowes Sapphire Falls Resort at Universal Orlando | Orlando, FL

Date & Time	Accounting, Auditing, and Financial Reporting	Budget, Economics, and Financial Planning	Policy, Leadership, Strategic Planning, and Personnel	Banking, Investment, Risk, Treasury Management, and Debt Management	Technology
Saturday June 13, 2026					
8:00 AM to 9:40 AM		<p>Title: Strategic Purchasing Decisions: Balancing Compliance, Value, and Risk</p> <p>Date: Saturday June 13, 2026 Time: 8:00-9:40 am Topic: Effective procurement is not about choosing one purchasing method over another—it's about knowing when to use the right tool for the right situation. This session provides a practical, decision-based framework for navigating common procurement strategies in public sector environments. Through real-world examples and clear decision points, this session will help attendees make informed, compliant, and strategic purchasing decisions that balance speed, transparency, and value while reducing institutional risk.</p> <p>CPE: 2.0 Hours (TB)</p> <p>Speaker: Kate Rotella Governing Board Chair, National Institute of Governmental Purchasing Mike Mucha Deputy Executive Director, Government Finance Officers Association (GFOA)</p>		<p>Title: "Extra, Extra," Hear All the Economic Updates!</p> <p>Date: Saturday June 13, 2026 Time: 8:00-9:40 am Topic: Stay informed on the latest economic trends impacting state and local governments. This session provides an expert outlook on inflation, interest rates, employment, and fiscal policy developments that directly affects financial planning.</p> <p>CPE: 2.0 Hours (TB)</p> <p>Speaker: Damien Grant Senior Vice President, Fixed Income, MBS Securities Greg Pagans Vice President, MBS Securities</p>	
		<p>Moderator: Wayne Meyer Director of Operations, Justice Administrative Commission</p>		<p>Moderator: Tameka Blake, MPA Budget Analyst, City of Boca Raton</p>	
10:00 AM to 11:40 AM		<p>Title: Making Compliance Work: Aligning Procurement, Budget, and Communication</p> <p>Date: Saturday June 13, 2026 Time: 10:00-11:40 am Topic: Procurement compliance extends beyond policies and procedures—it relies on clear documentation, strong budget alignment, and effective communication with internal stakeholders. This session focuses on the practical realities of maintaining compliance while building trust and collaboration across departments. This session emphasizes real-world approaches to partnering with internal departments, improving understanding of procurement requirements, and fostering a culture where compliance, transparency, and shared responsibility support institutional goals.</p> <p>CPE: 2.0 Hours (TB)</p> <p>Speaker: Kate Rotella Governing Board Chair, National Institute of Governmental Purchasing Mike Mucha Deputy Executive Director, Government Finance Officers Association (GFOA)</p>		<p>Title: Implementing a Strong Investment Program</p> <p>Date: Saturday June 13, 2026 Time: 10:00-11:40 am Topic: Learn the fundamentals of building a robust investment program that balances yield, safety, and liquidity. Experts will share proven practices and tools for managing portfolios in today's interest rate environment.</p> <p>CPE: 2.0 Hours (TB)</p> <p>Speaker: John Scott, CTP Client Advisor, Deep Blue Investment Advisors Dominick Cristofaro Director, Client Advisory Services, Deep Blue Investment Advisors</p>	
		<p>Moderator: Wayne Meyer Director of Operations, Justice Administrative Commission</p>		<p>Moderator: Tameka Blake, MPA Budget Analyst, City of Boca Raton</p>	

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Date & Time	Accounting, Auditing, and Financial Reporting	Budget, Economics, and Financial Planning	Policy, Leadership, Strategic Planning, and Personnel	Banking, Investment, Risk, Treasury Management, and Debt Management	Technology
1:00 PM to 2:40 PM				<p>Title: Liquidity Management and Cash Flow Forecasting</p> <p>Date: Saturday June 13, 2026 Time: 1:00-2:40 pm Topic: Accurate forecasting is critical for liquidity and operational success. Learn techniques and tools governments are using to forecast cash flow, optimize balances and ensure sufficient liquidity under varying economic conditions.</p> <p>CPE: 2.0 Hours (TB)</p> <p>Speaker: John Grady III Managing Director, Public Trust Municipal Advisors (PTMA)</p> <p>Zach Falconer Senior Director, Public Trust Municipal Advisors (PTMA)</p> <p>Mike Stramara Senior Vice President, Public Trust Municipal Advisors (PTMA)</p>	<p>Title: Automating Year-End Close and Core Financial Processes: Practical AI and Automation Strategies - Part 1</p> <p>Date: Saturday June 13, 2026 Time: 1:00-2:40 pm Topic: Come and learn how simple automation tools can streamline data collection, improve task coordination, and reduce manual errors common in closing and reporting processes. Let's walk through examples of how local governments are already using AI and automation to simplify repetitive work, strengthen controls, and improve visibility during the close process.</p> <p>CPE: 2.0 Hours (TB)</p> <p>Speaker: Gail Gray CEO & Co-Founder, GrayLopez Strategic Solutions</p> <p>Sam Lopez CTO, GrayLopez Strategic Solutions</p>
	3:00 PM to 4:40 PM				<p>Moderator: Tameka Blake, MPA Budget Analyst, City of Boca Raton</p>
					<p>Title: Investment and Fiduciary Oversight of Defined Contribution or Pension Plans</p> <p>Date: Saturday June 13, 2026 Time: 3:00-4:40 pm Topic: Fiduciary oversight of Public sector retirement plans is more critical than ever. Explore best practices and regulatory expectations for managing defined contribution (DC) and pension plans. Gain insight into fiduciary responsibilities, monitoring investment performance and managing plan fees and service providers.</p> <p>CPE: 2.0 Hours (TB)</p> <p>Speaker: Jacob Peacock Managing Director, DC Advisory Services, Mariner</p> <p>John Thinnes Senior Institutional Advisor, Mariner</p>
				<p>Moderator: Tameka Blake, MPA Budget Analyst, City of Boca Raton</p>	<p>Moderator: Amy Clark Senior Consultant, Local Government Practice Group, Berry, Dunn, McNeil & Parker, LLC</p>

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Sunday June 14, 2026

First Time Attendees 11:00am - 11:45am

Opening General Session 1:00pm - 2:40pm - (1.5 Hour(s)(BEH))

3:00 PM to 4:40 PM	<p>Title: Single Audit Essentials: Requirements & Best Practices</p> <p>Date: Sunday June 14, 2026 Time: 3:00-4:40 pm Topic: This session will provide a comprehensive overview of Single Audit requirements, SEFA preparation and compliance practices. Participants will learn how to account for grants, strengthen internal controls and prepare accurate SEFAs, including reporting expenditures and deferred revenue. The session will also highlight common audit findings, pitfalls to avoid and key updates under the Uniform Guidance to equip staff with practical tools for successful audits and long-term compliance.</p> <p>CPE: 2.0 Hours (AA)</p> <p>Speaker: Christopher Kessle, CPA Principal, CliftonLarsonAllen LLP (CLA) Marcia Carty City Manager, City of Palatka</p>	<p>Title: Public Procurement: From Barrier to Strategic Value – and Beyond</p> <p>Date: Sunday June 14, 2026 Time: 3:00-4:40 pm Topic: Public procurement is often perceived as a barrier—focused on rules, approvals, and restrictions. In reality, modern public procurement plays a critical role in advancing organizational strategy, managing risk, and delivering long-term value. This session challenges outdated perceptions and reframes procurement as a strategic partner and organizational enabler. This session provides both a mindset shift and actionable strategies for positioning public procurement as a trusted advisor—one that drives efficiency, supports mission-critical outcomes, and contributes meaningfully to organizational success.</p> <p>CPE: 2.0 Hours (TB)</p> <p>Speaker: Kate Rotella Governing Board Chair, National Institute of Governmental Purchasing Mike Mucha Deputy Executive Director, Government Finance Officers Association (GFOA)</p>	<p>Title: Keep Burnout at Bay</p> <p>Date: Sunday June 14, 2026 Time: 3:00-4:40 pm Topic: This panel discussion seeks to provide fiscal leaders in local government with practical tools and strategies to maintain optimal personal and organizational mental wellness and reduce the likelihood of burnout. Presentation objectives include the expectation that attendees will develop skills to: - Support and strengthen mental health, coping and functioning. - Sustain and grow effectiveness in public service. - Demonstrate the competent confidence to recognize and initiate appropriate referrals when mental health support and/or interventions when indicated.</p> <p>CPE: 2.0 Hours (BEH)</p> <p>Speaker: Dr. Orville Clayton Executive Coach, Health Peak LLC Dr. Sandra Dunbar Smalley Chief Learning Officer, Advent Health Marva Davis Orange County Government, HR Business Partner</p>	<p>Title: ERP Implementation Without the Headaches: Real -World Advice from Government Agencies</p> <p>Date: Sunday June 14, 2026 Time: 3:00-4:40 pm Topic: Transitioning to a new ERP system presents unique challenges for government agencies, from managing stakeholder expectations to minimizing operational disruptions. This session delves into real-world experiences, highlighting proven strategies in change management, effective communication and risk mitigation. Attendees will walk away with practical insights and actionable best practices to ensure smoother, more successful ERP transitions within their own organizations. Additionally, the session will address how to leverage technology and collaboration to foster adoption and maximize the long-term value of ERP investments.</p> <p align="center">*EVOLUTION SERIES</p> <p>CPE: 2.0 Hours (TB)</p> <p>Speaker: Christa Johnson Budget Manager, Polk County Hermilio Rodriguez Information Technology Director, City of Sarasota Lana Hicks Fiscal Functional Analyst, Polk County Comptroller's Office Nichole Wood, CPA, CPFO Assistant Director, Finance Division, Office of Ken Burke, Clerk of the Circuit Court and Comptroller, Pinellas County</p>	
		<p>Moderator: Annette Payne Accounting Supervisor, Broward County</p>	<p>Moderator: Wayne Meyer Director of Operations, Justice Administrative Commission</p>	<p>Moderator: Brianna Stack Manager, Finance, City of Tavares</p>	<p>Moderator: Amy Clark Senior Consultant, Local Government Practice Group, Berry, Dunn, McNeil & Parker, LLC</p>
		<p>Extra Microphone: Mariele Lemke Accounting Manager/Office Manager, Volusia-Flagler Transportation Planning Organization (TPO)</p>			<p>Extra Microphone: Michelle Phelps Fiscal Manager, Health and Human Services</p>

Association Night

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Date & Time	Accounting, Auditing, and Financial Reporting	Budget, Economics, and Financial Planning	Policy, Leadership, Strategic Planning, and Personnel	Banking, Investment, Risk, Treasury Management, and Debt Management	Technology
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Monday June 15, 2026

2nd General Session 8:00am - 9:40am (2.0 Hour(s)(BEH))

10:00 AM to 11:15 AM	<p>Title: Lean Teams, Strong Controls: Internal Controls in Today's Staffing Reality</p> <p>Date: Monday June 15, 2026</p> <p>Time: 10:00-11:15 am</p> <p>Topic: With ongoing staffing shortages and budget constraints across governments of all sizes, maintaining strong internal controls is more challenging than ever. This session focuses on practical, risk-based strategies to preserve accountability and compliance despite limited staff capacity, emphasizing the importance of skills, knowledge, and smart process design—not just headcount.</p> <p>CPE: 1.5 Hours (AA)</p> <p>Speaker: Racquel McIntosh, CPA Founder & Managing Partner, Racquel McIntosh CPA PA</p> <p>Patricia White, CPA, CPFO, CGFO Controller, City of Pompano Beach</p>	<p>Title: Bridging the Gap: A Budget Bootcamp for Finance Professionals</p> <p>Date: Monday June 15, 2026</p> <p>Time: 10:00-11:15 am</p> <p>Topic: This session offers a practical overview of the government budget process. Led by experts with cross-functional experience, it covers budget cycles, terminology and stakeholder roles—highlighting key differences and synergies between budgeting and finance. Attendees will learn how to better align budgeting with financial reporting, capital planning and operational performance.</p> <p align="center">*EVOLUTION SERIES</p> <p>CPE: 1.5 Hours (TB)</p> <p>Speaker: Melissa Licourt Budget Director, St. John's Water Management District</p> <p>Sharon Almeida Finance Director, Village of Royal Palm Beach</p> <p>Christine Tenney Director of Financial Services, City of Fort Myers</p> <p>Lorrie Brinson, CPA, CGFO, MBA Manager, Governmental Advisory Services, James Moore & Co</p>	<p>Title: Ignite!</p> <p>Date: Monday June 15, 2026</p> <p>Time: 10:00-11:15 am</p> <p>Topic: If you have ever wondered how to engage or motivate your team, or even yourself, you don't want to miss this session! Whether you are the leader of the team or a member of the team, a cohesive and engaged team is a must. The question becomes how is it possible, among all the distraction of life? In today's fast paced and ever changing environment, it can feel like you are multi-tasking, juggling and even barely surviving, and yet, as a leader your focus needs to be your team. Take an introspective look at your own leadership, and the impact you have on others. Everyone can lead in a way that inspires, motivates, and engages others no matter.</p> <p>CPE: 1.5 Hours (BEH)</p> <p>Speaker: Nicole Gasparri, CGFO, PHR Chief Administrative Officer, Clerk of the Circuit Court & Comptroller, Palm Beach County</p>	<p>Title: Understanding Arbitrage and Bond Compliance</p> <p>Date: Monday June 15, 2026</p> <p>Time: 10:00-11:15 am</p> <p>Topic: Demystify the complex world of arbitrage calculation, payment and compliance. Participants will also explore how these requirements pair with ongoing bond compliance, continuing disclosure and best practices for staying audit ready.</p> <p>CPE: 1.5 Hours (TB)</p> <p>Speaker: Scott Gordon Senior Manager, Integrity Public Finance Consulting LLC</p> <p>Laurie Scott CEO, Integrity Public Finance Consulting LLC</p> <p>Will Milford Shareholder, Bryant Miller Olive P.A.</p>	
	Moderator: Rip Colvin, CPA, CGFO, CPM Executive Director, Justice Administrative Commission	Moderator: Kadem V. Ramirez Chief Financial Officer, Village of Wellington	Moderator: Kate Smith Finance Director, Lake County Sheriff's Office	Moderator: Annette Payne Accounting Supervisor, Broward County	
	Extra Microphone: Mariel Lomke Accounting Manager/Office Manager, Volusia-Flagler Transportation Planning Organization (TPO)	Extra Microphone: Allison Tesla Director, Office of Management & Budget, City of Gainesville			

Standing Committee Meetings 11:20am - 12:30pm

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Date & Time	Accounting, Auditing, and Financial Reporting	Budget, Economics, and Financial Planning	Policy, Leadership, Strategic Planning, and Personnel	Banking, Investment, Risk, Treasury Management, and Debt Management	Technology
1:00pm to 2:40pm	<p>Title: GASB Update: Upcoming Initiatives and Requirements</p> <p>Date: Monday June 15, 2026 Time: 1:00-2:40 pm Topic: Come and get an overview of the latest developments from the Governmental Accounting Standards Board (GASB), with a focus on upcoming initiatives and new reporting requirements that will impact local governments. Participants will learn about recently issued statements, projects currently on the GASB agenda and anticipated changes in areas such as financial reporting, disclosures and compliance. The session will highlight key timelines and practical steps finance officers can take now to prepare for implementation.</p> <p>CPE: 2.0 Hours (AA) Speaker: Alan Skelton, CPA Director, Research and Technical Activities, Governmental Accounting Standards Board</p> <p>Lisa Parker Senior Project Manager & GASAC Coordinator, Governmental Accounting Standards Board</p>	<p>Title: Stewardship and Building Trust with Citizens: A Leadership Perspective</p> <p>Date: Monday June 15, 2026 Time: 1:00-2:40 pm Topic: In today's climate of heightened public scrutiny, government finance leaders must go beyond resource management to build public trust. This session examines how ethical leadership, transparent reporting and strategic communication enhance accountability and citizen confidence. Participants will learn best practices and real-world case studies to strengthen their role as trusted stewards of public resources and champions of civic engagement.</p> <p>*EVOLUTION SERIES</p> <p>CPE: 2.0 Hours (BEH) Speaker: Esmund Scott Village Manager, Miami Shores Village</p> <p>Laurette Joan Assistant County Administrator, Broward County</p> <p>John Drury City Administrator, City of Tavares</p> <p>Jennifer Barker County Administrator, Lake County</p>	<p>Title: "Elected Officials Are Our Friends" - Bruce the Shark</p> <p>Date: Monday June 15, 2026 Time: 1:00-2:40 pm Topic: The synergy between city/county administrators and their elected officials is essential for the efficient delivery of services to residents. A panel consisting of administrators and elected officials will discuss their perspectives and strategies for establishing productive relationships.</p> <p>"UNOFFICIAL EVOLUTION SERIES"</p> <p>CPE: 2.0 Hours (BEH) Speaker: Kevin A. Burns Councilman, City of North Miami</p> <p>Jennifer Moon Retired, Director, Office of Management & Budget, Miami-Dade County</p> <p>Shannon Ramsey-Chessman, CPA, CGFO Chief of Staff & Chief Deputy Clerk, Clerk of the Circuit Court & Comptroller, Palm Beach County</p> <p>Jamie Roberson, CGFO Chief Operating Officer of Finance, Martin County Clerk of the Circuit Court & Comptroller</p>	<p>Title: "Let's Bond" Over Bonds, Notes and Beyond: Financing Capital Projects</p> <p>Date: Monday June 15, 2026 Time: 1:00-2:40 pm Topic: Public agencies face multiple options when funding capital projects. This session examines bonds, bank loans, public-private partnerships and other alternatives—helping you compare structures and select the right approach for your organization's needs.</p> <p>CPE: 2.0 Hours (TB) Speaker: Jeff Larson President, Larson Consulting Services, LLC</p> <p>Brenda Westlake Grants Administrator, City of Venice</p> <p>Linda Senne Finance Director, City of Venice</p>	
	<p>Moderator: Dean Michael Mead, CGFM Partner, CRI Advisors, LLC</p>	<p>Moderator: Kate Smith Finance Director, Lake County Sheriff's Office</p>	<p>Moderator: Kadem V. Ramirez Chief Financial Officer, Village of Wellington</p>	<p>Moderator: Annette Payne Accounting Supervisor, Broward County</p>	
	<p>Extra Microphone: Mariel Lemke Accounting Manager/Office Manager, Volusia-Flagler Transportation Planning Organization (TPO)</p>	<p>Extra Microphone: Michelle Phelps Fiscal Manager, Health and Human Services</p>	<p>Extra Microphone: Robert Smith Program Administrator, Justice Administrative Commission</p>		

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Date & Time	Accounting, Auditing, and Financial Reporting	Budget, Economics, and Financial Planning	Policy, Leadership, Strategic Planning, and Personnel	Banking, Investment, Risk, Treasury Management, and Debt Management	Technology
3:00pm to 4:40pm	<p>Title: GASB's Rear-View Mirror: Recent Implementations and Lessons Learned</p> <p>Date: Monday June 15, 2026 Time: 3:00-4:40 pm Topic: This session will provide a practical look back at recently implemented and newly effective GASB standards, highlighting lessons learned and best practices from the field. Topics will include accounting for and tracking leases (GASB 87) and SBIFAs (GASB 98), capital asset reporting challenges and the new requirements for compensated absences under GASB 101. The session will also touch on other recent standards, including GASB 99 (Omnibus 2022) and GASB 100 (Accounting Changes and Error Corrections), offering insights on implementation, common pitfalls and strategies to ensure smoother adoption and stronger financial reporting going forward.</p> <p>CPE: 2.0 Hours (AA)</p> <p>Speaker: Alan Skelton, CPA Director, Research and Technical Activities, Governmental Accounting Standards Board Lisa Parker Senior Project Manager & GASAC Coordinator, Governmental Accounting Standards Board</p> <p>Moderator: Kadem V. Ramirez Chief Financial Officer, Village of Wellington</p> <p>Extra Microphone: Dean Michael Mead, CGFM Partner, CRI Advisors, LLC</p>	<p>Title: Economic Update</p> <p>Date: Monday June 15, 2026 Time: 3:00-4:40 pm Topic: This session will explore key economic indicators such as GDP, inflation, interest rates, consumer confidence and employment figures and what they reveal about the broader economy. Participants will learn how to interpret these indicators and apply them in practical ways to enhance financial planning, budgeting and investment strategies. Understanding the economic landscape can help you anticipate changes, manage risk and identify opportunities. Stay ahead of the curve with insights that turn economic data into actionable guidance.</p> <p>CPE: 2.0 Hours (TB)</p> <p>Speaker: James Marple Assistant Vice President, Economics, TD Bank Group</p> <p>Moderator: Kristin Thompson Finance Program Manager, Suwannee River Water Management District</p>	<p>Title: The Journey</p> <p>Date: Monday June 15, 2026 Time: 3:00-4:40 pm Topic: The Current FGFOA Officers and Board of Directors will discuss their career progression and journeys. *EVOLUTION SERIES</p> <p>CPE: 2.0 Hours (BEH)</p> <p>Speaker: 2025 - 2026 Officers & Board of Directors</p> <p>Moderator: Ken Burke Clerk of the Circuit Court and Comptroller, Pinellas County</p> <p>Extra Microphone: Wayne Meyer Director of Operations, Justice Administrative Commission</p>	<p>Title: It's Me vs. AI: Why Human Judgment Still Matters</p> <p>Date: Monday June 15, 2026 Time: 3:00-4:40 pm Topic: AI tools like ChatGPT and Microsoft Co-pilot are powerful aids for analyzing data and generating reports, but they're not flawless. This session explores why AI should complement, not replace, human expertise, emphasizing the critical need for validation and oversight. Using practical examples like sales tax calculations, we'll discuss why fine-tuning AI outputs is essential before trusting them, and how human judgment remains irreplaceable in ensuring accuracy and reliability. Government professionals will gain insights on responsibly integrating AI into public sector workflows while maintaining transparency, accountability, and compliance.</p> <p>CPE: 2.0 Hours (TB)</p> <p>Speaker: Candace Pierce Manager, Berry, Dunn, McNeil & Parker, LLC</p> <p>Moderator: Kristin Lambert JAC Internal Audit, Justice Administrative Commission</p>	

Leadership/Mentorship Networking Event 5:00pm - 6:30pm

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Date & Time	Accounting, Auditing, and Financial Reporting	Budget, Economics, and Financial Planning	Policy, Leadership, Strategic Planning, and Personnel	Banking, Investment, Risk, Treasury Management, and Debt Management	Technology
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Tuesday June 16, 2026

8:00am to 9:40am	<p>Title: Avoiding Common Audit Findings in Local Government</p> <p>Date: Tuesday June 16, 2026</p> <p>Time: 8:00-9:40 am</p> <p>Topic: Do you know what the most common audit finds are? Would you like to learn some practical strategies to address and prevent them? In this session participants will gain valuable insights into internal control weaknesses, compliance issues and reporting challenges, along with proven best practices to enhance financial management and minimize the risk of recurring findings.</p> <p>CPE: 2.0 Hours (AA)</p> <p>Speaker: Lorrie Brinson, CPA, CGFO, MBA Manager, Governmental Advisory Services, James Moore & Co Roderick Harvey, CPA, CVA Managing Member, HCT Certified Public Accountants & Consultants LLC</p>	<p>Title: Strategic & Financial Planning: Building Sustainable, Long-Term Government Budgets</p> <p>Date: Tuesday June 16, 2026</p> <p>Time: 8:00-9:40 am</p> <p>Topic: A strategic vision means little without the financial framework to sustain it—and the ability to measure progress along the way. This session equips government finance professionals with the tools to align strategic goals with long-term fiscal planning and evaluate project effectiveness through meaningful metrics. Learn how to build a multi-year financial forecast for governmental funds, integrate capital improvement planning and assess the economic impact of new development on the budget. Explore practical approaches to stakeholder engagement, timeline development and defining performance indicators that support a unified roadmap for long-term fiscal sustainability.</p> <p>CPE: 2.0 Hours (TB)</p> <p>Speaker: Franklin Santos Manager, Fiscal & Operational Support Division, Planning, Environmental, and Development Services Department (PEDS), Orange County Government Peter Napoli Senior Manager, Stantec MTC Financial Management</p>	<p>Title: The Gift that Keeps on Giving - The Mentoring Series</p> <p>Date: Tuesday June 16, 2026</p> <p>Time: 8:00-9:40 am</p> <p>Topic: The most successful leaders were developed with the help of trusted individuals who provided them with the necessary wisdom and support. Come and learn how leaders for this session "pay it forward" and mentor the next generation. *EVOLUTION SERIES</p> <p>CPE: 2.0 Hours (BEH)</p> <p>Speaker: Kadem Ramirez Chief Financial Officer, Village of Wellington Dr. Elvis Epps Executive Leadership Coach Jess Savidge Administrative and Communications Manager, Town of Palm Beach</p>	<p>Title: The One Big Beautiful Bill: What It Means for Governments</p> <p>Date: Tuesday June 16, 2026</p> <p>Time: 8:00-9:40 am</p> <p>Topic: Unpack the contents of recent legislation and its impact on government agencies. Explore how tariffs, Department of Justice provisions and other elements influence fiscal operations and compliance obligations.</p> <p>CPE: 2.0 Hours (TB)</p> <p>Speaker: Emily S. Brock Director, Federal Liaison Center, Government Finance Officers Association (GFOA)</p>	
	<p>Moderator: Annette Payne Accounting Supervisor, Broward County</p>	<p>Moderator: Elizabeth Walter, MBA, CGFO, CPFIM Budget & Grants Manager, South Florida Regional Transportation Authority</p>	<p>Moderator: William Bowers Senior Fiscal Services Manager - Utilities, Manatee County Government Financial Management Division</p>	<p>Moderator: Amy Clark Senior Consultant, Local Government Practice Group, Berry, Dunn, McNeil & Parker, LLC</p>	
	<p>Extra Microphone: Michelle Phelps Fiscal Manager, Health and Human Services</p>		<p>Extra Microphone: Wayne Meyer Director of Operations, Justice Administrative Commission</p>		

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June 13-17, 2026 | Lowes Sapphire Falls Resort at Universal Orlando | Orlando, FL

Date & Time	Accounting, Auditing, and Financial Reporting	Budget, Economics, and Financial Planning	Policy, Leadership, Strategic Planning, and Personnel	Banking, Investment, Risk, Treasury Management, and Debt Management	Technology
10:00am to 11:15am	<p>Title: Follow the Money: Forensic Auditing in Action</p> <p>Date: Tuesday June 16, 2026 Time: 10:00-11:15 am</p> <p>Topic: This session will introduce participants to forensic auditing and fraud detection techniques. Using case studies and practical examples, attendees will learn how to identify red flags, apply simple detection methods and understand the role and purpose of forensic audits in government finance. The focus will be on equipping finance professionals with the knowledge and tools needed to uncover fraud and respond effectively.</p> <p>CPE: 1.5 Hours (AA)</p> <p>Speaker: Ben Kincaid, CPA, CFF, CFE, CVA Partner, Carr, Riggs & Ingram LLC (CRI)</p>	<p>Title: From Budgets to Breakthroughs: Driving Results Through Collaboration</p> <p>Date: Tuesday June 16, 2026 Time: 10:00-11:15 am</p> <p>Topic: Effective government requires more than managing budgets—it demands strong collaboration across departments. This session explores practical approaches to improve communication, coordinate initiatives and align resources within your organization. Learn how to build trust, streamline decision-making and work collectively to solve problems and achieve shared goals.</p> <p>*EVOLUTION SERIES</p> <p>CPE: 1.5 Hours (TB)</p> <p>Speaker: Diane Reichard Chief Financial Officer, City of Plant City</p> <p>Denise Finn Procurement Manager, City of Fort Myers</p> <p>Matthew Fuhrer Office of Management and Budget Director, Osceola County</p>	<p>Title: Legislative Updates</p> <p>Date: Tuesday June 16, 2026 Time: 10:00-11:15 am</p> <p>Topic: This session will provide an overview of the 2026 Legislative Session, including a review of the bills that passed and failed and a discussion of their implications for local governments.</p> <p>CPE: 1.5 Hours (TB)</p> <p>Speaker: Jason Harrell Chief External Affairs Officer, Florida Institute of Certified Public Accountants (FICPA)</p>		<p>Title: Driving Efficiency and Controls through Hyperautomation</p> <p>Date: Tuesday June 16, 2026 Time: 10:00-11:15 am</p> <p>Topic: In today's fast-paced environment, local governments are leveraging hyperautomation to boost efficiency, strengthen internal controls and do more with less. This session explores how AI-driven analytics, process automation, and cloud integration streamline operations, reduce manual tasks, minimize errors and improve compliance. Attendees will discover practical, real-world examples of automating routine processes; freeing up staff time and reducing costly mistakes. Whether new to automation or looking to expand its use, participants will leave with actionable strategies to transform everyday operations and meet growing demands with limited resources.</p> <p>CPE: 1.5 Hours (TB)</p> <p>Speaker: David Palmer Information Technology Director, Polk County Government</p>
	<p>Moderator: Kate Smith Finance Director, Lake County Sheriff's Office</p>	<p>Moderator: Rebecca Schnirman, CPRP Director, Financial & Support Services, Palm Beach County Parks and Recreation Department</p>	<p>Moderator: Anna C. Otiniano, CGFO Financial Services Director, City of Plantation</p>		<p>Moderator: Brianna Stack Manager, Finance, City of Tavares</p>
			<p>Extra Microphone: Kristin Thompson Finance Program Manager, Suwannee River Water Management District</p>	<p>Extra Microphone: Robert Smith Program Administrator, Justice Administrative Commission</p>	

Innovation Awards Luncheon & Past Presidents Recognition 11:30am - 1:15pm

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1:30pm to 3:10pm	<p>Title: Auditor General and Department of Financial Services Update</p> <p>Date: Tuesday June 16, 2026 Time: 1:30-3:10 pm</p> <p>Topic: The latest updates from the Florida Auditor General and the Department of Financial Services will be covered at this session. Participants will hear about recent audit trends, reporting requirements, legislative changes and key initiatives affecting local governments. Learn what's new, what's on the horizon and how these updates may impact your financial reporting and compliance responsibilities.</p> <p>CPE: 2.0 Hours (AA)</p> <p>Speaker: Renee Hermeling Director of Accounting and Auditing, Florida Department of Financial Services</p> <p>Tammy A. Eastman, CPA, FCCM Chief, Bureau of Financial Reporting Division of Accounting & Auditing</p> <p>Derek H. Noonan Audit Manager, Auditor General</p>	<p>Title: Financial Policies: The Nuts and Bolts</p> <p>Date: Tuesday June 16, 2026 Time: 1:30-3:10 pm</p> <p>Topic: This practical session will walk participants through the essential components of developing and implementing sound financial policies including how to structure policies, define effective dates and ensure organization-wide adoption. We'll also explore strategies for determining appropriate financial reserves. Whether you're updating existing policies or starting from scratch, this session will provide actionable tools, real-world examples and key considerations for maintaining fiscal health and long-term sustainability.</p> <p>CPE: 2.0 Hours (TB)</p> <p>Speaker: Katie Ludwig Director of Resource Development, Government Finance Officers Association (GFOA)</p> <p>Darrell Thomas Assistant City Manager/CFO, City of Weston</p>	<p>Title: The Secret Sauce for Organizational Success - Lean Six Sigma</p> <p>Date: Tuesday June 16, 2026 Time: 1:30-3:10 pm</p> <p>Topic: How can the use of Lean Six Sigma principles lead to more efficient operations? The tone at the top is an important consideration. If leadership embraces the concepts, the rest of the organization will follow. Come and learn the concepts of Lean Six Sigma and the "culture" needed to make it successful. What started in the private sector has made its way to the public sector and it requires a culture of breaking down silos and working as a team.</p> <p>CPE: 2.0 Hours (BEH)</p> <p>Speaker: Dr. Keith A. Clinkscale Ombudsman & Director of Strategic Planning and Performance Management, Palm Beach County</p>	<p>Title: Rating Agency FAQ's & Updates</p> <p>Date: Tuesday June 16, 2026 Time: 1:30-3:10 pm</p> <p>Topic: All that local governments need to know to prepare for and begin a new rating process including suggested pertinent information to support the rating agency's review. Panelists will discuss credit attributes associated with higher rated entities and also factors that contribute to lower rating levels. Rating agency updates will also be discussed.</p> <p>*EVOLUTION SERIES</p> <p>CPE: 2.0 Hours (TB)</p> <p>Speaker: Jenny Garza Director, S&P Global</p> <p>Valentina Gomez VP-Senior Analyst, Public Finance Group, Moody's Ratings</p> <p>Kevin Dolan Director, U.S. Public Finance, Fitch Ratings</p>	
	<p>Moderator: William Blend, CPA, CFE Managing Director, Forvis Mazars, LLP</p>	<p>Moderator: Kate Smith Finance Director, Lake County Sheriff's Office</p>	<p>Moderator:</p>	<p>Moderator:</p>	
	<p>Extra Microphone: Amy Clark Senior Consultant, Local Government Practice Group, Berry, Dunn, McNeil & Parker, LLC</p>			<p>Extra Microphone: Diane Martinez Chief Financial Officer, Escambia County - Housing Finance Authority</p>	

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3:30pm to 4:45pm	<p>Title: Getting Audit-Ready: Strategies to Streamline and Simplify Your Next Audit</p> <p>Date: Tuesday June 16, 2026 Time: 3:30-4:45 pm Topic: Ever wonder what auditors are really looking for and why the audit process can feel so time-consuming? In this session, participants will learn about common audit findings and gain practical strategies to prepare effectively, address potential issues in advance, and collaborate efficiently with auditors. You'll walk away with actionable tips to streamline the process, minimize disruptions, and help ensure your auditors are in and out as quickly as possible.</p> <p>CPE: 1.5 Hours (AA) Speaker: Damian Mesa Assurance Manager, CPA, RSM US LLP</p> <p>Rodrigo Moreno Assurance Supervisor, RSM US LLP</p>		<p>Title: "Yes, We Can" - Women in Leadership Series</p> <p>Date: Tuesday June 16, 2026 Time: 3:30-4:45 pm Topic: A panel of female leaders will discuss their own journeys, including the necessary skills and balancing acts, struggles and successes. They'll also share how to inspire and support other women and the next generation to do great things.</p> <p>*EVOLUTION SERIES</p> <p>CPE: 1.5 Hours (BEH) Speaker: Tanya Wilson, AICP Director, Planning, Environmental, and Development Services Department (PEDS), Orange County Government</p> <p>Shaun Gayle Assistant City Manager, City of Miramar</p> <p>Nicole Gasparri, CGFO, PHR Chief Administrative Officer, Clerk of the Circuit Court & Comptroller, Palm Beach County</p> <p>Emily Colon Partner at The Southern Group</p>	<p>Title: Infrastructure Investment & Public-Private Partnerships (PPPs)</p> <p>Date: Tuesday June 16, 2026 Time: 3:30-4:45 pm Topic: Explore the evolving landscape of infrastructure investment and the critical role of Public-Private Partnerships (PPPs) in delivering sustainable, large-scale infrastructure projects. Participants will gain insights into financing mechanisms, risk allocation, regulatory frameworks and successful case studies from around the world.</p> <p>CPE: 1.5 Hours (TB) Speaker: Sergio Masvidal Managing Director, PFM Financial Advisors LLC</p> <p>Chris Roog CRA Executive Director, City West Palm Beach</p> <p>Bridget Souffrant Chief Financial Officer, City of West Palm Beach</p>	<p>Title: Cybersecurity Risk & Social Engineering: Empowering Finance Teams to Navigate the Human Factor</p> <p>Date: Tuesday June 16, 2026 Time: 3:30-4:45 pm Topic: This session examines the intersection of social engineering, technology and cybersecurity risk—focusing on the unique vulnerabilities within finance teams. Attendees will explore common attack tactics like phishing and baiting, and how emerging technologies can both expose and defend against these threats. The session highlights the critical role of finance professionals in managing cyber risks through internal controls, access reviews and vendor assessments, while emphasizing the importance of awareness, training and ethical tech use to build organizational resilience.</p> <p>CPE: 1.5 Hours (TB) Speaker: Danny Sementillli IT Operations Manager, City of Coconut Creek</p>
	Moderator:		Moderator: Melissa Burns, CGFO Finance Director, City of St. Augustine	Moderator:	Moderator:
	Extra Microphone:	Mariei Lemke Accounting Manager/Office Manager, Volusia-Flagler Transportation Planning Organization (TPO)		Extra Microphone: Sarah Simpson, CPA, CGFO, CPFO Budget Manager, City of Aventura	

Tuesday Night Event

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Wednesday June 17, 2026

9:15am to 10:30am	<p>Title: Elevate Your ACFR: Tips, Tools, and Techniques for Better Reporting</p> <p>Date: Wednesday June 17, 2026 Time: 9:15-10:30am Topic: Designed for both beginners and experienced preparers, this session will cover the essential components of the Annual Comprehensive Financial Report (ACFR) and highlight best practices for producing a clean, reader-friendly report. Using examples from different types of governments, the session will emphasize common pitfalls to avoid and practical improvements that can elevate your ACFR.</p> <p>CPE: 1.5 Hours (AA) Speaker: Jeff Wolf Partner, Forvis Mazars LLP Joel Knopp, CPA Partner, Forvis Mazars LLP</p>	<p>Title: TRIM Compliance: Insights and Lessons Learned</p> <p>Date: Wednesday June 17, 2026 Time: 9:15-10:30am Topic: This panel offers government finance professionals a clear overview of the Truth in Millage (TRIM) process, featuring experts from property tax, local government and multi-county taxing authorities. Attendees will gain insights into millage calculations, compliance requirements and effective inter-agency coordination to ensure transparency and accuracy. Panelists will also share practical lessons learned from recent TRIM cycles, highlighting common challenges, successful strategies and best practices to help streamline future reporting and communication.</p> <p>CPE: 1.5 Hours (TB) Speaker: Kristin Thompson Finance Program Manager, Suwannee River Water Management District Katrina Scarborough Property Appraiser, Osceola County Tavia Ritchie Finance Director, City of Kissimmee</p>	<p>Title: Situational Ethics</p> <p>Date: Wednesday June 17, 2026 Time: 9:15-10:30am Topic: State and local governments establish codes of ethics that we must abide by however there are often times when we are faced with situations that don't have clear ethical solutions. Professionals will discuss specific case studies and their outcomes.</p> <p align="center">*EVOLUTION SERIES</p> <p>CPE: 1.5 Hours (BEH) Speaker: Michael Murawski Executive Director, City of Naples Ethics Commission Robert Meyers Partner, Weiss Serota Helfman Cole & Bierman Jennifer Moon Retired, Director, Office of Management & Budget, Miami-Dade County Rip Colvin, CPA, CGFO, CPM Executive Director, Justice Administrative Commission</p>	<p>Title: Treasury Innovations in the Public Sector: Real-World Successes</p> <p>Date: Wednesday June 17, 2026 Time: 9:15-10:30am Topic: Explore how public-sector entities are modernizing treasury operations through virtual credit card programs, ACH payments and fraud reduction strategies. This session highlights practical case studies, rebate opportunities and methods to reduce reliance on paper checks while strengthening financial security.</p> <p>CPE: 1.5 Hours (TB) Speaker: Ralph Hildevert Executive Director, JPMorgan Charles Million Executive Director, JPMorgan John Rauback Treasury Manager, City West Palm Beach Jamie Roberson, CGFO Chief Operating Officer of Finance, Martin County Clerk of the Circuit Court & Comptroller</p>	
	<p>Moderator:</p>	<p>Moderator: Anna C. Otiniano, CGFO Financial Services Director, City of Plantation</p>	<p>Moderator: Benjamin Salz Capital Budget Analyst V, Broward County Public Schools</p>	<p>Moderator:</p>	
	<p>Extra Microphone: Annette Payne Accounting Supervisor, Broward County</p>		<p>Extra Microphone: Michelle Phelps Fiscal Manager, Health and Human Services</p>		

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11:00am to 11:50am	<p>Title: Small Government Focus: Challenges and Best Practices</p> <p>Date: Wednesday June 17, 2026 Time: 11:00 - 11:50 am Topic: Florida's small governments and special districts often face unique challenges due to limited budgets and small staffs handling multiple responsibilities. This session will explore how these entities differ from larger counties and cities in terms of reporting requirements, compliance obligations, and day-to-day operations. Participants will gain practical strategies and best practices to help small governments improve efficiency, accountability, and financial management.</p> <p>*EVOLUTION SERIES</p> <p>CPE: 1.0 Hours (TB)</p> <p>Speaker: Jonathan C. McKinney Finance Director, City of Deltona Rob Hogan Grants Director, Delivering Results & Solutions (DRS)</p>	<p>Title: Demystifying Grants: A Strategic Approach to Success</p> <p>Date: Wednesday June 17, 2026 Time: 11:00 - 11:50 am Topic: Grants are vital for government funding, but effective management goes beyond tracking dollars. This session offers practical strategies for finance professionals to enhance grant readiness, compliance and performance. Learn how to align organizational capacity, meet funding requirements and integrate grants into financial planning across the grant lifecycle. Ideal for both newcomers and experienced staff, this session will help strengthen oversight, reduce audit risk and maximize funding impact.</p> <p>CPE: 1.0 Hours (TB)</p> <p>Speaker: Katie Ludwig Director of Resource Development, Government Finance Officers Association (GFOA)</p>			<p>Title: Excel Tips & Tricks: Boost Your Productivity and Master Key Features</p> <p>Date: Wednesday June 17, 2026 Time: 11:00 - 11:50 am Topic: Unlock the full potential of Excel with practical tips and tricks designed to save you time and increase accuracy. This session covers powerful shortcuts, formulas, data visualization techniques, and automation tools that can streamline your daily tasks. Whether you're a beginner or looking to sharpen your skills, you'll leave with actionable strategies to work smarter and more efficiently in Excel.</p> <p>CPE: 1.0 Hours (TB)</p> <p>Speaker: Rebecca Schnirman, CPRP Director, Financial & Support Services, Palm Beach County Parks and Recreation Department</p>
	<p>Moderator: Sarah Simpson, CPA, CGFO, CPFO Budget Manager, City of Aventura</p>	<p>Moderator:</p>			<p>Moderator: Elizabeth Walter, MBA, CGFO, CPFIM Budget & Grants Manager, South Florida Regional Transportation Authority</p>
	<p>Extra Microphone: Marisel Lemke Accounting Manager/Office Manager, Volusia-Flagler Transportation Planning Organization (TPO)</p>				

