GOVERNMENT FINANCE OFFICERS ASSOCIATION OF ALABAMA

Wednesday, February 5, 2025

9:00a – 4:00p

Registration

Renaissance Lobby

12:45p – 1:00p

Renaissance Ballroom CDE

Conference Welcome & Opening Remarks

Vita Smith-Parker - President, GFOAA

1:00p – 2:40p

Renaissance Ballroom CDE

Common audit issues & findings: Examiner of Public Accounts perspective

James Hall - State Auditor Director, Examiner of Public Accounts

Mr. James Hall is the Director of the State Audit Division for the State of Alabama's Department of Examiners of Public Accounts. Mr. Hall is a 1992 graduate of the University of Montevallo where he received his Bachelor of Business Administration degree, with a major in Accounting. James is also Certified Public Accountant, licensed in the State of Alabama. After his college graduation he went to work for a CPA firm and remained there for over 2 years. In 1994, he began his career with the Department of Examiners of Public Accounts by working as an Accounts Examiner and in 2013 became the Department's Director of the County Audit Division. In 2020, James left the County Division and became the Department's Director of the State Audit Division. James has been a featured speaker for numerous organizations across the State discussing various audit topics. He has also traveled to various states, participating in the National State Auditors Association's audit peer review program, to ensure other states are conducting their audits in a satisfactory manner. James is married to Beth Strong Hall and has one daughter, Laura Beth.

Nikki Morrison - County Audit Director, Examiner of Public Accounts

Nikki T. Morrison is the County Audit Director for the Department of Examiners of Public Accounts. She has worked with the Department since 2005 and has served as County Audit Director since 2020. Nikki has audited numerous county agencies, including commissions, boards of education, and locally elected officials' offices throughout the State, and continues to supervise the audits of these entities in her current role with the Department. She received both her Bachelor of Science in Accounting and Master of Public Administration degrees from Jacksonville State University. Nikki has also been a Certified Public Account since 2009.

Approved for 2 hours of Auditing and Accounting CPE

2:40p – 2:50p

Break

Please join us outside of the conference room for refreshments.

2:50p – 3:40p

Renaissance Ballroom CDE

Internal Control Findings

Leita Hart-Fanta - Founder, Yellowbook-CPE

Leita Hart-Fanta, CPA is the founder of Yellowbook-CPE. Yellowbook-CPE provides enjoyable, relevant, and convenient courses to government auditors. And, as the name implies, most courses qualify for Yellow Book hours.

After graduating from the University of Texas at Austin, Leita started her audit career in public accounting before moving on to become a legislative auditor and a federal grant controller. She founded her training company in 1994, has authored over 15 books, and has led over 3,000 conference sessions and seminars.

Approved for 1 hour of Auditing and Accounting CPE

3:40p – 4:30p

Renaissance Ballroom CDE

A Government Auditor*'s Responsibility for Fraud*

Leita Hart-Fanta - Founder, Yellowbook-CPE

Leita Hart-Fanta, CPA is the founder of Yellowbook-CPE. Yellowbook-CPE provides enjoyable, relevant, and convenient courses to government auditors. And, as the name implies, most courses qualify for Yellow Book hours.

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Approved for 1 hour of Auditing and Accounting CPE

5:00p – 7:00p

Welcome Reception - Hosted by GFOAA

Please join us for Hors d'oeurves & drinks.

Alabama Dept of Archives & History
Main Lobbies and Milo B Howard Auditorium
624 Washington Ave
Montgomery, AL 36104

GOVERNMENT FINANCE OFFICERS ASSOCIATION OF ALABAMA

Thursday, February 6, 2025

7:00a - 8:00a
Renaissance
Ballroom CDE

Breakfast

8:00a - 8:15a
Renaissance
Ballroom CDE

Welcome to Montgomery

Montgomery Chamber of Commerce

8:15a - 9:05a
Renaissance
Ballroom CDE

Bid Law

Taylor Nichols - Chief Legal Counsel, Department of Finance

Taylor Nichols is General Counsel to the Alabama Department of Finance, where he advises the State Finance Director and the 300+ employees who administer core state government functions including budgeting, accounting, procurement and contracting, property management, and risk management. In this role, he is also an Assistant Attorney General, chief counsel to the State Board of Adjustment, and legal advisor to the State's bond financing authorities.

Prior to Finance Department, he served as Deputy Attorney General for the Office of Information Technology (OIT), where he was general counsel to Alabama's Secretary of Information Technology. He previously served as Policy Analyst for Governor Bob Riley, Deputy Chief of Staff to Lieutenant Governor Kay Ivey, and counsel for the Alabama Department of Commerce. Taylor holds a bachelor's degree in Economics, a J.D., and an M.B.A. from the University of Alabama.

Christine Cook - Chief Procurement Officer, Department of Finance

Christine Cook is the Chief Procurement Officer with the State of Alabama Department of Finance and has been in the position since July of 2022. Prior to coming to the State she was the Purchasing Director for Alfa Mutual Insurance Company for 17 years. She's a graduate of Auburn University at Montgomery with a Bachelor's degree in Business Administration. She obtained her Certified Purchasing Manager certification in 2009 and completed the Alfa Leadership Academy in 2019. In her almost two decades of procurement she has gained experience in a wide array of goods and services and made a conscious effort to resolve issues while promoting a collaborative environment for all involved parties.

Bryan Matthews - Deputy Chief Procurement Officer, Department of Finance

Bryan Matthews is the Deputy Chief Procurement Officer with the State of Alabama Department of Finance and has been in the position since October of 2023. Bryan is a graduate of Huntingdon College with a Bachelor's degree in Business Management. During Bryan's time with the State he has had the opportunity to work with agencies and suppliers through a wide range of contracting needs and associated challenges ranging from uniforms, hardware, and grounds/facility care, to vehicles and heavy equipment purchases and help to guide agencies along the way.

Approved for 1 hour of Other Business CPE

9:05a - 10:00a
Renaissance
Ballroom CDE

Trump 2.0: Potential Muni Market Implications - *Debt and Investment Considerations*

Marcie Lewis - Senior Managing Consultant, PFM Financial Advisors LLC

Marcie Lewis has 25 years of experience as a municipal financial advisor with expertise in both general municipal and affordable housing advisory services to clients across the United States, particularly in AL and TN. In 2018, Marcie helped form an Alabama chapter of Women in Public Finance of which she currently serves as President.

Ms. Lewis has a B.A. in Psychology with a minor in Business Administration from Converse University in Spartanburg, SC. She lives in Huntsville and is married and has a 21 year old son.

Joshua McCoy - Managing Director, PFM Financial Advisors LLC

Joshua McCoy has over 16 years of experience as a municipal financial advisor with expertise in both general municipal, public utilities, transportation and higher education clients. Mr. McCoy is a Managing Director at PFM and co-leads the firm's Alabama practice as well as supports the firm's Higher Education Group serving clients throughout Alabama and the Southeast. Mr. McCoy has a B.A. in Economics and Business from Rhodes College and is also a graduate of the Alabama Leadership Initiative (Class 2) and Leadership Greater Huntsville Connect (Class 18).

Approved for 1 hour of Other Business CPE

10:00a - 10:15a

Break

Please join us outside of the conference room for refreshments.

GOVERNMENT FINANCE OFFICERS ASSOCIATION OF ALABAMA

Thursday, February 6, 2025

10:15a - 11:30a

Uncovering the hidden threat of Technology: Configuring accounting & audit processes from manual to electronic

Chadwick Smith - Chief Information Security Officer, Office of Information Technology

Chadwick Smith is a seasoned cybersecurity expert and business strategist with over 25 years of experience in the tech and finance sectors. Currently the Chief Information Security Officer for the State of AL Office of Information Technology, Chadwick has dedicated his career to enhancing security frameworks and solving complex business challenges through innovative technology and process improvements. Before his tenure at the State, he served as a cybersecurity specialist for Cisco Systems covering eleven states and was also the Chief Information Security Officer at Colonial Bank, where he was instrumental in aligning the institution with international cybersecurity standards, significantly enhancing security of bank operations. His leadership extended to advising the board of directors, presenting technology risk management strategies, and working with numerous companies and state agencies developing security and privacy management programs. Chadwick's notable projects include pioneering work with the Alabama Department of Transportation to integrate smart technology in roadside assistance, and collaborating with the FBI on international cybercrime prevention. His deep understanding of digital forensics, ISO standards, and data communications has made him a frequent speaker on cybersecurity, process improvement, and technology governance. In addition to his professional life, Chadwick is passionate about education and mentoring, bringing his extensive knowledge to help others think differently and succeed. He holds studies in Computer Science from Troy State University and has pursued independent studies in cybersecurity, process design, and economics. Today, Chadwick will share insights on how strategic use of technology not only meets audit requirements but also drives organizational efficiency and security.

Approved for 1.8 hours of Other Business CPE

11:30a - 12:00p
Renaissance
Ballroom CDE

Sponsor Presentations & Door Prizes

12:00p - 1:00p
Renaissance
Ballroom CDE

Lunch & GFOAA Annual Business Meeting

1:15p - 2:05p
Renaissance
Ballroom CDE

Unlocking a Positive Mind

Debra Nickolson - Vice President, Corporate Training & Customer Relations, Behavioral Health Systems, Inc.

Debra Nickolson has been with BHS since 2005. She has been in healthcare for more than 30 years. In her current position she has developed the dedicated role of client retention and quality assurance with clients, members and providers. She manages the Education and Training needs for 50+ client groups focusing on mental health and wellness including work-life balance, stress and depression management and professional development. Prior to joining BHS, Ms. Nickolsons professional experience included 20 years of Managed Care experience with a focus on client and physician relationships.

Ms. Nickolson is active in several professional organizations including the National Society of Human Resource Management, The Business Council of Alabama, The Alabama Psychiatric Association and the Association of Talent Development. Ms. Nickolson is also registered with FEMA (Federal Emergency Management Association).

Approved for 1 hour of Other Business CPE

2:05p - 2:55p
Renaissance
Ballroom CDE

Alabama State Budgets: Today, Tomorrow and the Future

Doryan Carlton - State Budget Officer, Dept. of Finance

Doryan Carlton began her career in the Executive Budget Office as an entry level analyst over twenty years ago. She has served in various analyst positions specializing in everything from Economic Development to Health and Human Services, including most previously serving as Assistant State Budget Officer since 2017. Governor Kay Ivey appointed Doryan as the State Budget Officer on March 1, 2020. In this position, Doryan serves as Director of the Executive Budget Office and advises both the Finance Director and Governor on policy, program, legislative and budget issues involving state agencies and institutions.

Approved for 1 hour of Other Business CPE

GOVERNMENT FINANCE OFFICERS ASSOCIATION OF ALABAMA

Thursday, February 6, 2025

2:55p - 3:10p

Break

Please join us outside of the conference room for refreshments.

3:10p - 4:50p
Renaissance
Ballroom CDE

ACFR Panel

Allison D. Edge - Finance Director, City of Auburn

Allison Edge is the Finance Director/Treasurer for the City of Auburn. She has been with the City for over 25 years. She came to the City as an accountant in 1999 and has since held the positions of Financial Analyst, Principal Financial Analyst, and Assistant Finance Director. She moved into her current position as Finance Director in September of 2019. Prior to this, she worked in banking for 5 years and private sector accounting for 1 year.

Allison is currently an adjunct instructor of governmental and nonprofit accounting at Auburn University. She also teaches a payroll course for the Alabama Certified Payroll Specialist program administered by the Alabama Association of Public Personnel Administrators and the Public Budgeting and Financial Management course administered by the Alabama City/County Management Association.

Allison received a bachelor's in business administration degree from LaGrange College and a Master of Accountancy degree from Auburn University. She is a licensed Certified Public Accountant in Alabama. She has served the East Alabama Chapter of the Alabama Society of CPAs as an officer and as a chapter representative on the Alabama Society of CPAs board. She has also served as a board member and officer for the Government Finance Officers Association of Alabama.

Ford Handley - City Administrator, City of Orange Beach

Ford Handley graduated from the University of Alabama in 2009 with a Bachelor of Science in Commerce and Business Administration. He received his Master of Accounting in 2010 from the University of South Alabama. Mr. Handley started with Grant, Sanders, & Taylor, P.C., in January of 2011. He worked on governmental audits and taxes until 2014 when he transitioned to Staff Accountant with the City of Orange Beach. In July of 2017, Mr. Handley took over as Finance Director for the City of Orange Beach. In 2022, Mr. Handley was promoted to City Administrator. He also served as CSFO for the first year of the new Orange Beach City School System in April of 2022.

Rick Thomas - Accounting Manager, State Comptroller's Office

Rick Thomas is an Accounting Manager with the State of Alabama's – Comptroller Office Financial Reporting section. He has 11+ years of financial reporting experience. His experience includes preparing the State of Alabama's ACFR, SEFA, CMIA, as well as other various reports. He has a MBA from Troy University and received his CPM from AUM

Approved for 2 hours of Other Business CPE

5:30p – 8:00p
Renaissance
Ballroom B

Evening Dinner and Drinks

Please join us for an evening reception featuring a cocktail hour followed by dinner.

5:30p - Cocktail hour begins
6:00p - Dinner is served

GOVERNMENT FINANCE OFFICERS ASSOCIATION OF ALABAMA

Friday, February 7, 2025

7:00a - 8:00a
Renaissance
Ballroom CDE

Breakfast

8:00a - 8:55am
Renaissance
Ballroom CDE

Discovering the Advantages of Concur for Streamlined Travel and Expense Management

Lindsay Bryant - Accounting Director, State Comptroller's Office

Lindsay Bryant began her state career with the Comptroller's Office more than 10 years ago and currently serves as the Accounting Director, overseeing the Accounts Payable, Agency Services, and Card Services sections. She played a key role as the Functional Lead in the implementation of the Concur Project and continues to contribute her expertise in exploring new opportunities that the system can provide to the State. With over 25 years of experience in the accounting field, Mrs. Bryant is also a Certified Fraud Examiner.

Brett Gantt - Accounting Manager, State Comptroller's Office

Brett Gantt is an Accounting Manager in the Comptroller's Office at the Department of Finance. For the past nine years, Brett has built his career within the department. He started as an accountant in the State Business Systems division, working on the STAARS Go Live team and supporting the STAARS help desk. Brett then moved to the Comptroller's Office as part of the STAARS Support Team.

During his time at the Comptroller's Office, Brett has worked in various divisions, including Financial Reporting, Shared Services, Accounts Payable, and the COVID Relief Funds Office. While managing the COVID Relief Funds Office, he helped distribute COVID grants to municipalities, counties, universities, businesses, and non-profits across the state. Brett now leads the Concur and Card Services sections, continuing to grow as an accountant. Concur is the State's travel system, while the Card Services section administers the State's Travel Card and Purchasing Card programs.

Approved for 1 hour of Other Business CPE

8:55a - 9:45am
Renaissance
Ballroom CDE

Fraudulent Checks: Investigations into fraud issues and prevention

Brandon Henderson - Special Agent, Montgomery Associate Office US Postal Service

Special Agent Brandon Henderson is a nineteen-year veteran of law enforcement and holds a bachelor's degree in criminology from Auburn University. During his career he has been involved in every type of investigation at the local, state, and federal level.

Special Agent Henderson began his career as a patrolman for the city of Opelika in 2005 rising to the rank of Detective Sergeant. In 2015 Special Agent Henderson transitioned to the United States Secret Service in Boston, MA where he was assigned to the Electronic Crimes Task Force working transnational criminal organizations operating in New England. In 2018 Special Agent Henderson began teaching at the US Secret Service Academy's, James J. Rowley Training Center in Laurel, MD, before moving home to Alabama in 2019 with the US Postal Service, Office of Inspector General. Special Agent Henderson is assigned to the Montgomery Associate Office of the USPS, OIG. Special Agent Henderson is married with two children and lives in Auburn, AL.

Approved for 1 hour of Other Business CPE

9:45a - 10:00a

Break

Please join us outside of the conference room for refreshments.

10:00a - 11:45a
Renaissance
Ballroom CDE

Conflict Resolution

Sharon Lovoy - President, Lovoy's Team Works

Sharon W. Lovoy, owner of Lovoy's Team Works, Inc., is an executive coach, facilitator, keynote speaker, author, and intervention specialist in high stakes challenges. She works with over 450 organizations which include clients such as Mercedes Benz USI, UAB Health Systems, Momentum Leaders, and a cross function of all types of organizations. She is known for her lively style and for the practicality of her information.

Approved for 2 hours of Personal Development CPE

11:45a - 12:00p

Closing Remarks & Door Prizes

Vita Smith-Parker - President, GFOAA