



New Orleans

Le Journal de Nouvelle Orleans

AGA serves government accountability professionals by providing quality education, fostering professional development and certification, and supporting standards and research to advance government accountability.

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New Member

Patrick Landry

AGA operates under a national-chapter partnership with its 100 chapters located throughout the U.S., Guam, Japan, Puerto Rico and Saipan. AGA is governed by a National Board of Directors (NBD), which includes regional leaders and chapter presidents. AGA's 16-member National Executive Committee (NEC) acts for the NBD, meeting quarterly to discuss strategic issues. The day-to-day operation of the Association is handled by the National Office, headquartered in Alexandria, VA, with 28 employees reporting to an executive director who reports to the AGA National President. More than 800 volunteer members serve the Association through committees, boards, and chapters. Thanks for being one of them!

(An excerpt from the Journal of Government Financial Management)



President's Message

Hello Everyone,

It was wonderful having such a large turnout at our AGA luncheon meeting held on January 21, 2010, in the Executive Dining Room at the National Finance Center. I want to thank all the members and guests who attended the luncheon. Our timely Tax Update program presented by Ms. Earline Brown, Stakeholder Liaison with the Internal Revenue Service, was most informative. Thank you to Marcie Tureaud, Meetings Chair, for scheduling Ms. Brown as our speaker. Our meetings are not possible without the hard work, dedication and contributions from our fabulous Chapter Officers and Committee Chairs and Co-Chairs. Thank you for your continued support; you are truly my inspiration. I would also like to thank the past officers who are always there and offering their support and guidance. Finally, thank you members, we would not be the great Chapter that we are without YOU!

Renewal time is here! Annual membership and CGFM renewal packets should have arrived in your mailboxes the last week of January. You have the option of renewing on-line at the following website: www.agacgfm.org. I would like to encourage all of you to use this quick and easy method to renew your membership.

Early Career Month for AGA is February! As an AGA member, you understand the value of your membership. A vital and growing AGA means greater awareness of the important work of financial managers in advancing government accountability. Who better to spread the word about AGA than you, one of the dedicated members? Please consider sharing the value of AGA membership with friends, colleagues, and especially with the early career employees in your area. Remember, as you recruit new members; be sure to have them list you as their sponsor. Your name and member identification number must appear in the "Sponsor's Name" section of the application for you to receive credit as the sponsor of record.

I look forward to seeing all of you at the upcoming dinner meeting on February 18, 2010, at Don's Seafood Hut located on 4801 Veterans Boulevard in Metairie.

Amanda L. Green, CGFM
Chapter President

Erroll G. Williams



Mr. Erroll G. Williams, *Guest Speaker*

- ❖ Graduate of Dillard University-Bachelor of Arts in Accounting and Tulane University-Masters in Business Administration
- ❖ Thirty years of Accounting and Government experience
- ❖ Orleans Parish Board of Assessors
May 1985 -- Present
Assessor, Third Municipal District
- ❖ Louisiana Assessors' Association
2005 -- President
- ❖ City of New Orleans
March 1984 -- May 1985
Chief Administrative Officer
- ❖ City of New Orleans
May 1978 -- March 1984
Director of Finance

- ❖ Alexander Grant & Co., Certified Public Accountants
May 1975-May 1978 -- Certified Public Accountant
- ❖ New Orleans Municipal Employees' Credit Union (NOME)
1979-2004 -- Member
1988-2004 -- Chairman of the Board
- ❖ Lutheran Social Services of the South, Inc.
1987-Present -- Board of Governors
- ❖ Jesuit Boys Hope, New Orleans Chapter, Member
- ❖ National Association of Black Accountants, 1971 -- Present
- ❖ Black MBA Association, Member
- ❖ Government Financial Accountants Association -- 1978-Present
- ❖ International Association of Assessing Officers -- 1985- Present
- ❖ Bradford National Life Insurance Company -- 1992-1999 Board Member
- ❖ Alpha Phi Alpha Fraternity
- ❖ Married and father of two

January 2010 Association of Government Accountants

The meeting was called to order at 11:50 a.m. by Amanda Green, President. Amanda introduced the new members who were in attendance. Shelda Melancon gave the invocation, followed by the Pledge of Allegiance, led by Amanda. Amanda then introduced the Officers at the head table, as well as, Karen Whittaker, a representative from our sponsor, Becker. Amanda also announced that two of our members, Saed Abu Naser and Patrick Ned, had earned MBA's from the University of New Orleans.

Darlene Fisher, President Elect, announced that the Chapter recognition points are found in the Newsletter; and if anyone was interested in being an officer or committee member for the Chapter, they should contact her.

Linda Lewis, Community Service Chair, thanked the members for their huge support in the Chapter's Toys for Tot campaign; and for helping out at the WYES telethon. She reminded everyone that the Chapter is still collecting cell phones; and members should also consider donations to the Red Cross for Haiti.

Chris Lewis, Education Chair, announced there are three more teleconferences in February and May; and the Spring luncheon is scheduled for April 22, 2010.

Knica Lloyd, Meetings Chair, expressed her appreciation to the members for their quick e-mail responses when they *R.S.V.P.* to meetings. She also announced our next meeting would be held at Don Seafood Hut on February 18, 2010.

The meeting broke for lunch.

Marcie Trudeau introduced the afternoon's speaker, Ms. Erline Brown from the IRS. Ms. Brown gave a presentation outlining several changes in the tax code for the 2009 tax year and answered questions.

The meeting was adjourned after Amanda Green thanked Ms. Brown and her guest for taking time to speak to our Chapter today.

Dawn Wagener, CGFM
Secretary

Five Tax Changes for 2009

As you get ready to prepare your 2009 tax return, the Internal Revenue Service wants to make sure you have all the details about tax law changes that may impact your tax return. Here are the top five changes that may show up on your 2009 return:

1. The American Recovery and Reinvestment Act

ARRA provides several tax provisions that affect tax year 2009 individual tax returns due April 15, 2010. The recovery law provides tax incentives for first-time homebuyers, people who purchased new cars, those that made their homes more energy efficient, parents and students paying for college, and people who received unemployment compensation.

2. IRA Deduction Expanded

You may be able to take an IRA deduction if you were covered by a retirement plan and your 2009 modified adjusted gross income is less than \$65,000 or \$109,000 if you are married filing a joint return.

3. Standard Deduction Increased for Most Taxpayers

The 2009 basic standard deductions all increased. They are:

- \$11,400 for married couples filing a joint return and qualifying widows and widowers
- \$5,700 for singles and married individuals filing separate returns
- \$8,350 for heads of household

Taxpayers can now claim an additional standard deduction based on the state or local sales or excise taxes paid on the purchase of most new motor vehicles purchased after February 16, 2009. You can also increase your standard deduction by the state or local real estate taxes paid during the year or net disaster losses suffered from a federally declared disaster.

4. 2009 Standard Mileage Rates

The standard mileage rates changed for 2009. The standard mileage rates for business use of a vehicle:

- 55 cents per mile

The standard mileage rates for the cost of operating a vehicle for medical reasons or a deductible move:

- 24 cents per mile

The standard mileage rate for using a car to provide services to charitable organizations remains at 14 cents per mile.

5. Kiddie Tax Change

The amount of taxable investment income a child can have without it being subject to tax at the parent's rate has increased to \$1,900 for 2009.

For more information about these and other changes for tax year 2009, visit IRS.gov.

Links:

- [FS-2010-4](#), 2009 Tax Law Changes Provide Saving Opportunities for Nearly Everyone
- The American Recovery and Reinvestment Act of 2009: [Information center](#)
- [1040 Central](#)
- Form 1040 instructions ([PDF 941K](#))

AGA - New Orleans Chapter 2009-2010 Community Service Plan Planned Community Service Events

1. **Rebuilding Together New Orleans** www.rtno.org
Assist with revitalizing houses for the elderly, disabled, or families with children - TBD
2. **Dress for Success - SOS "Send One Suit" Week**
Accept donations of slightly used clothing for disadvantaged women entering the workforce - TBD
3. **On-going Community Service Collections**
Slightly used DVDs for area Nursing Homes
Magazines for Nursing Homes
Cell phones for Battered Women
Personal Care Products
Slightly used clothes for mission centers

2009- 2010 New Orleans Chapter Community Service Contacts:

Monique.Banks@usda.gov

504-426-0282

Linda.Lewis2@usda.gov

504-426-6121

Nashville Chapter Secures

“Preferred” Status for CGFM Applicants

Job seekers with the CGFM will have an advantage over uncertified competitors if they apply for certain positions in Tennessee’s Office of the Comptroller of the Treasury.

AGA’s Nashville Chapter was instrumental in making the CGFM a “preferred” qualification for three positions in the Office of Management Services within the comptroller’s office: contract review administrator, business administration manager and legislative sourcing oversight manager.

Nashville Chapter President Karen B. Hale, MAOM, CGFM, said she was asked last spring to review job specifications, titles and duties after the retirements of two longtime leaders in the Office of Management Services – including Past AGA National President Charles Harrison, CPA, CGFM. During the reorganization, she proposed the three job specifications include the statement, “A certification as a government finance manager (CGFM) is preferred.” Comptroller of the Treasury Justin P. Wilson approved the change, effective Aug. 1.

The process took a few months, but it was fairly straightforward. Hale’s office is full of AGA supporters and CGFMs, many of whom were involved in the CGFM’s earliest stages, such as Harrison and Past AGA National President Richard Norment, CGFM, CIA. Her director, for example is Immediate Past Regional Vice President Melinda Parton, CGFM. “We’re fortunate here to have such a rich history,” Hale said. “They laid the groundwork.”

All three positions are now filled with professionals who have passed the CGFM Examinations. Hale, who is the current business administration manager, said she believes that the CGFM certification strengthens an applicant’s knowledge base. “You can’t just walk in off the street and start working and be successful right away,” she said. “These positions involve a lot of on-the-job training, a lot of mentoring, and the more knowledge you bring to the table on the front end, the better.”

Tennessee has had many successes over the years. The state formally recognizes the CGFM designation with a salary increase if that particular department chooses to do so. The comptroller’s office also sponsored legislation two years ago that requires all municipalities in the state to employ a certified municipal finance officer (CMFO) to produce its financial statements. CGFMs are exempt from the educational requirements of the CMFO designation.

Katya Silver, AGA’s director of Professional Certification Administration, applauds the Nashville Chapter for its work. “It is great to see the Nashville chapter’s initiative and hard work pays off. What a wonderful example of AGA leadership and teamwork!”

In fact, Silver encourages other chapters to learn from what’s been accomplished in Tennessee and around the country. AGA recently held a teleconference dedicated to CGFM recognition – successful practices, challenges, ideas and tools.

Katya Silver
Director of Professional Certification
AGA - Advancing Government Accountability

Association of Government Accountants Certified Government Financial Manager (CGFM) Annual Plan for the New Orleans Chapter 2009-2010

GOAL 1 – Support Current CGFM’s

- ❑ Publish CGFM member’s achievements in newsletter and local newspapers.
- ❑ Partner with other organizations and/or governmental entities to promote the CGFM designation.
- ❑ Recognize local CGFM’s by using the CGFM designation in chapter publications, name tags, etc.
- ❑ Contribute items to chapter newsletter such as CGFM recognition, study suggestions, encouragement, and technical requirements.
- ❑ Publicize new CGFM’s in chapter and local publications.

GOAL 2 – Market CGFM Locally

- ❑ Encourage employer policy change to recognize CGFM.
- ❑ Solicit endorsements of CGFM from area employers and elected officials.
- ❑ Coordinate with the Regional and National coordinators to assist in promoting the Chapters goal.
- ❑ Contact area government accountability leaders.
- ❑ Create an awareness of the value of CGFM to the general public.

GOAL 3 – Assist Potential New CGFM’s in Attaining Certification

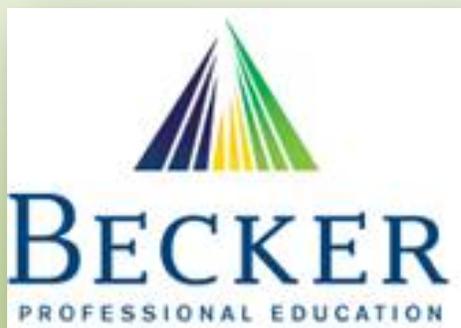
- ❑ Coordinate study groups.
- ❑ Develop a mentoring program.
- ❑ Develop other study options.
- ❑ Develop a plan in the Chapter to offer CGFM courses.
- ❑ Provide a CGFM Examination Scholarship.

AGA New Orleans Chapter Educational Sessions 2009 – 2010

Date	Time	Place	Audio Sessions
03/03/2010	1:00 p.m. – 2:50 p.m.	National Finance Center Auditorium, 2 nd Floor 13800 Old Gentilly Road New Orleans, LA	The War Against Fraud & Abuse, Are We Winning? (2 CPE)
03/19/2010	1:00 p.m. – 2:50 p.m.	National Finance Center (Same Address Above)	Those Faint Signals -- Learning to Catch Ethical Slips Before It’s Too Late (2 CPE)
05/19/2010	1:00 p.m. – 2:50 p.m.	National Finance Center (Same Address Above)	Ethics in Government

RECOGNITION POINTS 2009-2010

Recognition Categories	Max Credits Per Category	Credits Through December 2009
Chapter Leadership Planning and Participation	3,000	2,600
Education & Professional Development	4,000	4,125
Certification	4,000	5,900
Communications	3,000	4,285
Membership	3,000	975
Early Career and Student Members	2,000	500
Community Service	2,000	1,100
Awards	1,000	200
Total	22,000	19,685



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A dark red banner with the CGFM logo on the left and the words "NEWS FLASH" in large, bold, gold-colored capital letters on the right.

NEWS FLASH



AGA is once again offering a great opportunity to take the CGFM Examinations and earn your CGFM after the Eighth Annual National Leadership Conference (NLC). Whether you've found it difficult to find time to complete the three exams or just need an extra reinforcement of the material, this is your chance to get it done!

To help you reach that goal, we are offering a two-day Intensive Review Course on Monday, February 22, and Tuesday, February 23, 2010, and an opportunity to take the CGFM Examinations on February 24–25, 2010. The event will take place in Alexandria, VA. The cost of the course is only \$249 for qualified participants, and it offers 18 CPE hours. Special Bonus: The CGFM Examinations are offered at no cost to course attendees.

This course is designed as a supplement to previous preparation for the CGFM Examinations, so this is a perfect opportunity for those individuals who have already attended GFM training courses or have been preparing by using the CGFM Study Guides. Enrollment is limited and popular exam time slots are reserved quickly, so don't delay.

More information and a registration form for this event are available on the AGA website (http://www.agacgfm.org/nlc_2010/cgfm_exams.htm). If you have any questions, please contact Crystal Vanison at cvanison@agacgfm.org or at 800.AGA.7211, ext. 316.

AGA New Orleans Chapter Meetings 2009-2010 (Tentative)

Date	Time	Location* & Cost	Speaker* & CPE	Menu
February 18, 2010	5:30 P.M.	Don's Seafood Hut 4801 Veterans Blvd Metairie, LA 70006 AGA Members \$26, Guests \$28	Erroll G. Williams 1 CPE	Seafood Gumbo Dinner Salad Entrees (choose one) Seafood Platter Fried Shrimp (w/ french fries) Broiled Catfish Fillet (w/stuffed potato) Crabmeat Au Gratin (w/stuffed potato) Crawfish Etouffee 8 oz Ribeye (w/stuffed potato) Grilled Marinated Chicken Breast (w/stuffed potato) Dessert - Bread Pudding Soft Drinks, Coffee and Tea
March 24, 2010	5:30 P.M.	Five Happiness Restaurant 3605 S. Carrollton Avenue New Orleans, LA	Joint Meeting with American Society of Women Accountants <i>(their year to book speaker)</i> 1 CPE	
April 8, 2010	5:30 P.M.	Don's Seafood Hut 1915 S. Morrison Blvd. Hammond, LA	Billy Morehead, AGA National President Joint meeting with BR Chapter - Host 1 CPE	
May 20, 2010	5:30 P.M.	Green Acre's Country Club 5000 W. Napoleon Avenue Metairie, LA		Crawfish Boil
May 28, 2010	5:30 P.M.	Zephyr Stadium 6000 Airline Drive Metairie, LA	Zephyr 's CPA Night Chapter Awards Ceremony & Baseball Game	

* Tentative - Locations & Speakers based upon availability

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New Orleans Chapter Association of Government Accountants

Statement of Net Assets

Statement of Revenues, Expenses, and Changes in New Assets

	01/31/ 2010			Seven Months Ended 01/31/ 2010
Assets		Operating Revenues		
CURRENT ASSETS:		Education/Training	\$0.00	\$0.00
Cash	\$2,399.21	Monthly Meetings	659.00	3,216.00
Savings	9,406.25	Christmas Party	0.00	0.00
Deposit – Restaurants	0.00	50/50 Raffle	0.00	64.00
Prepaid Seminar Expenses	0.00	Membership Dues	0.00	656.70
Accounts Receivable	<u>25.00</u>	Sponsorship	0.00	200.00
TOTAL ASSETS	\$11,830.46	Interest Income	<u>1.85</u>	<u>24.51</u>
		Total operating revenue	\$660.85	\$4,161.21
Liabilities and Net Assets		Operating Expenses		
Accounts Payable	\$149.31	Education	\$0.00	\$0.00
NET ASSETS:		Business Meetings	646.37	4,889.40
Membership Recruitment	658.00	Christmas Party	0.00	0.00
Habitat Project Funds	0.00	50/50 Raffle	0.00	32.00
Hurricane Relief Fund	2,709.25	Postage/Supplies/Gifts	0.00	0.00
Unrestricted net assets	8,313.90	AGA PDC Raffle Basket	0.00	0.00
TOTAL LIABILITIES		Scholarship	0.00	0.00
AND NET ASSETS	\$11,830.46	Bank Charges	0.00	0.00
		Donations	0.00	0.00
		Speakers Gifts	0.00	0.00
		Habitat Crayfish Boil	0.00	0.00
		Officer Expenses	0.00	120.00
		Total operating expenses	\$646.37	\$5,041.04
		Operating Income (Loss)	\$14.48	(\$880.19)
		Non-operating Revenues (Expenses)	\$0.00	0.00
		Income (Loss) before Contributions	\$14.48	(\$880.19)
		Capital Contributions:	\$0.00	\$380.69
		Change in Net Assets	\$14.48	(\$499.50)
		Net Assets at Beginning of Period	\$4,224.14	\$8,813.40
		Net Assets at End of Period	\$4,238.62	\$8,313.90