



New England States Government
Finance Officers Association

77th Annual Fall Conference

September 15-18, 2024

Mystic Hilton
Mystic, CT

NESGFOA | 77th Annual Conference

Members, Colleagues, and Friends,

Welcome to the 77th annual New England States Government Finance Officers Association's Fall Conference at the Mystic Hilton; Mystic Ct. Mystic is a quintessential New England village that offers plenty of dining, shopping, and history making it one of the top travel destinations in the region.

The Connecticut Host Committee has committed itself to providing informative sessions on important subject matters relevant to our profession which are designed to help you navigate the winds and challenges of life as a public finance officer by helping you "set a better sail".

We have a robust educational program with exciting speakers planned! On Sunday evening we are hosting an opening reception at the Mystic Hilton. On Monday night, our evening event will be held at the Mashantucket Pequot Museum and Research Center. We will begin with self-guided tours of the museum for those who are interested, a cocktail reception, and then dinner and music provided by "Take it to the Bridge", a Rhode Island band that promises to deliver a unique blend of musical variety, high energy hits and of course dancing. Our post session schedule for Tuesday includes a dinner and DJ at the Mystic Aquarium along with some "special guests". I invite you to attend these events and to see them as an opportunity to meet new friends while networking and catching up with old colleagues. For those who enjoy golf, we reserved the Stonington Country Club Golf Course on Sunday. It is a beautifully landscaped, 18-hole, par 72 championship course, professionally designed for all levels of play. The golf course is naturally lush with trees, ponds, streams and stone walls that enhance the golfing experience and provide a natural habitat for birds and wildlife. For those who would rather relax and sample some local offerings, a beer and wine tasting are slated at the Mystic Hilton on Sunday afternoon.

A tremendous amount of effort takes place in planning this NESGFOA annual conference. As president, I have the privilege working with the many volunteers from the host committee who worked very hard to create a successful event for everyone. In addition, we could not have done this without the mass of support from our corporate sponsors who help create an affordable training event.

Therefore, I ask all of you to express your appreciation and recognition to our sponsors and host committee members by thanking them in person.

I look forward to seeing everyone in Mystic, as we have all the essential pieces in place for a great conference including a desirable location, a team of dedicated volunteers, generous sponsors and yourself. If this will be your first conference, I challenge you to become part of our 77-year history.

Lisa Hancock
President

Welcome!

The Connecticut Host Committee welcomes you to our 77th Annual Conference in Mystic, Connecticut. If you have any questions or concerns about the conference, please feel free to approach host committee members who will be sporting ribbons and are there to assist you. The committee is made up of the following members who, along with our volunteers are committed to ensuring you have a successful conference. (Some volunteers may have been added after this brochure was created and may not be included in this list.)

Host Committee Members:

Kim Lord, Manchester

Rob Buden, Plainville

Kevin Kenzenkovic, Retired

Lisa Hancock, Tolland

Diane Waldron, City of Bristol

Mary Jane Malavasi, Guilford

Anthony Esposito, North Branford

Sharon Devoe, Cromwell

Leigh Ann Ralls, Michelle Harrison,

Constance Reik, Asha Stapleton, Hartford

Rob Battaglia, ClearGov

Elisa Michell, Burlington

Patti Lewis, West Hartford

Brian Wissinger, Somers

Amy O'Toole, East Windsor

Orla McKiernan-Raferly, Norwich

David Flint, Clifton, Larson & Allen LLC

Jim Finch, Branford

Amanda Backus, Mansfield

Mandi Moore, Suffield

Ann Harter, Haddam

Michelle Braga, Santander Bank

Melissa Dionne, Glastonbury

Stephan Brown, Windsor Locks

Cynthia Varricchio, Preston

Whitney Castillo, Montville

David Delano, Executive Director

William Fazioli, Asst. Executive Director

Conference Information:

NAME BADGES:

Registrants and guests should have received their name badges upon check-in at the registration table based on the information they entered during the online registration process. Badges must be worn to all conference events, including the evening offsite social events. Guests will need to make alternative plans during Monday's annual business meeting luncheon and Tuesday's luncheon. During these times guests are encouraged to dine and shop in the area.

CPE CREDITS:

CPE sheets are available at the end of each day at the registration table.

TRANSPORTATION:

Bus Transportation will be provided to shuttle attendees and guests from the Hilton to the Mashantucket Pequot Museum for Monday's evening event.

BREAKFAST:

Breakfast will be served at the Mystic Hilton. Please note that breakfast is included with your conference registration, therefore you are encouraged to join us for breakfast regardless of your lodging arrangement

BEER and WINE TASTING:

If you purchased a ticket to this event, your ticket will be included in your reservation packet.

Keynote Speaker

RAINMAKER **THINKING**[®]

ABOUT BRUCE TULGAN

FOUNDER AND CEO, RAINMAKER THINKING, INC.



Bruce Tulgan is an adviser to business leaders all over the world and a sought-after keynote speaker and seminar leader. He is the founder and CEO of [RainmakerThinking, Inc.](#), a management research and training firm, as well as [RainmakerLearning](#), an online training resource. Bruce is the best-selling author of numerous books including *Not Everyone Gets a Trophy* (Third Edition, 2023), *Bridging the Soft Skills Gap* (Revised & Updated 2022), *The 27 Challenges Managers Face* (2014), and *It's Okay to be the Boss* (Revised & Updated, 2014). His newest book, *The Art of Being Indispensable at Work*, is available now from Harvard Business Review Press.

Bruce lectures at the Yale Graduate School of Management, as well as other academic institutions. He has written for the New York Times,

the Harvard Business Review, HR Magazine, and writes regularly for Training Magazine, Forbes.com, and Psychology Today.

Since 1995, Bruce has worked with tens of thousands of leaders and managers in hundreds of organizations. In recent years, Bruce was named by Management Today as one of the few contemporary figures to stand out as a "management guru" and he was named to the 2009 Thinkers50 Rising Star list. On August 13, 2009, Bruce was honored to accept Toastmasters International's most prestigious honor, the Golden Gavel. Bruce is a lifelong practitioner of Okinawan Uechi Ryu Karate Do and holds a seventh degree black belt, making him a Kyoshi master in that style. He lives in New Haven, CT with his wife Debby Applegate, Ph.D., who won the 2007 Pulitzer Prize for Biography for her book *The Most Famous Man in America: The Biography of Henry Ward Beecher* (Doubleday, 2006). Her new book, *Madam: The Biography of Polly Adler, Icon of the Jazz Age*, is available now from Doubleday.

Schedule of Events



Sunday, September 15th

Golf Tournament- Stonington Country Club
Beer and Wine Tasting – Mystic Hilton
Opening Reception – Mystic Hilton
Cocktails and live music provided by Robert Brannon



Monday, September 16th

Pequot Museum

Tours, dinner and live Music by **Take it to the Bridge Band**



Tuesday, September 17th

Mystic Aquarium

Dinner with DJ and "special guests"



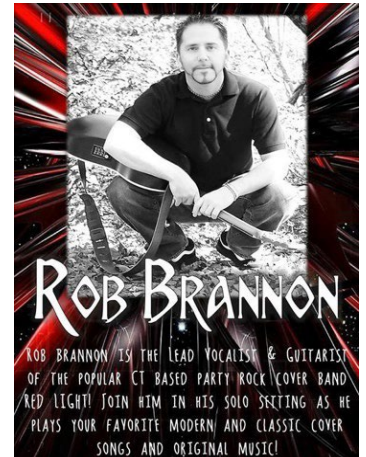
12:00 p.m. - 5:00 p.m. **Registration for Conference (Schooner Hallway)**

12:00 p.m. **Annual Golf Tournament**
Stonington Country Club Golf Course.
Sponsored by: US Bank

3:00 – 4:30 p.m. **Beer and Wine Tasting (Clipper Ballroom)**
Sponsored by: Northeast Bank

5:30 - 8:00 p.m. **Opening Reception (Mystic Hilton)**
Entertainment by Rob Brannon
Reception sponsored by: Lockton Companies
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Entertainment sponsored by: CLA



8:00 a.m. - 4:00 p **Registration (Schooner Hallway)**

7:00 a.m. - 9:00 a.m. **Breakfast**
Sponsored by Pullman & Comley

9:00 - 9:15 a.m. **President's Welcome**
Presenter: Lisa Hancock, NESGFOA President

9:15 - 10:15 a.m. **Keynote Address**
*Presenter: Bruce Tulgan,
Rainmaker Thinking
Worldwide Advisor to
Business Leaders
Sponsored by: Bank of America.*



The great generational shift –
the workforce is changing.
Are you ready?

10:15 - 10:30 a.m. **Break**
Sponsored by: Munistat

10:30 - 11:30 a.m. **Choose from Concurrent Sessions**
Distinguished Budgeting Award Roundtable (Schooner Ballroom)
*Presenters: Rob Battaglia of CLEARGOV
Anthony Genovese, Finance Director, Town of Woodbridge, CT
Diane Waldron, Comptroller, City of Bristol, CT*
This session provides an overview of best practices in budgeting and to preparing an award-winning budget document.

Building New Leaders: Critical Skills for Managers (Clipper Ballroom)
Presenters: Bruce Tulgan, Rainmaker Thinking
Building New Leaders: Critical skills for new managers.
An interactive session that will touch on workplace topics covered in the keynote address.

11:30 a.m. – 12:30 p.m. **Lunch**
Sponsored by: JP Morgan Chase Bank

12:30 - 1:30 p.m. **Choose from Concurrent Sessions**

Economic Outlook: Searching for Yield in Today's Economy (Schooner Ballroom)
Presenter: Greg Tomaszewicz, Baker Group
This session provides insights into effective cash management during volatile economic times.

Managing Pension Contribution Volatility in Well Funded Plans (Clipper Ballroom)
Presenter: Jenn Castelhana, FSA, EA, MAA Principal and Consulting Actuary, Milliman

Monday, September 16th Continued

1:30 - 1:45 p.m.

Break

Sponsored by: *Locke Lord LLP*

1:45 - 2:45 p.m.

Choose from Concurrent Sessions

Sponsored by: *Washington Trust*

Crafting an Effective Well-Being Strategy (Schooner Ballroom)

Presenters: *Nicole Stec, Lockton*

In this session you will learn the components of and tips to implement effective strategies to enhance employee well-being.

Understanding Your 457(b) Deferred Compensation Plan (Clipper Ballroom)

Presenter: *Joseph Matthews, Morgan Stanley*

Learn how to administer your 457 plan to ensure compliance with IRS regulations.

2:45 - 3:45 p.m.

New England Local Government Credit Environment

Presenter: *Michael Wertz, Moody's Investor's Services*

In this session, you will get a deep dive into the regional credit environment for local governments.

5:00 p.m.

Cocktail and Dinner Reception/Museum Tours (Pequot Museum)

Cocktail Reception sponsored by: *Updike, Kelly and Spellacy, Moody's Investment Services and Marcum Accountants and Advisors*

Dinner sponsored by: *Webster Bank*

Pequot Ballroom sponsored by: *Shipman and Goodwin*

7:00 - 10:30 p.m.

Live Performance by 'Take it to the Bridge' (Pequot Museum)

Sponsored by: *Phoenix Advisors*

M&T Bank/Wilmington Trust

7:00 a.m. - 9:00 a.m.

Breakfast

Sponsored by: Raymond James

9:00 a.m. – 9:15 a.m.

Annual Business Meeting (Schooner Ballroom)

NESGFOA members only.

9:15 - 10:15 a.m.

National GFOA Leadership Academy and CPFO Certification (Schooner)

Presenter: Lunda Asmani, National GFOA President Elect

This session will focus on the many resources available to prepare for the Certified Public Finance Official (CPFO) certification and the process. It will also provide information regarding the GFOA's Leadership Academy Program.

10:15 - 10:30 a.m.

Break

Sponsored by: OpenGov

10:30 – 11:30 a.m.

Choose from Concurrent Sessions

Best Practices in Asset Management (Schooner Ballroom)

Presenter: Shayne Kavanaugh, National GFOA

This session will explore strategies for local governments to maximize the value and longevity of public assets and cover best practices at all phases of an asset's lifecycle. Learn how sustainable asset management policies can help your community.

Artificial Intelligence in Finance (Clipper Ballroom)

Presenter: Mitch Thompson, CLA LLC

AI is everywhere. Are you ready to harness the power of AI and use it to improve your financial operations?

11:30 a.m. - 12:30 p.m.

Lunch

Sponsored by: Sea Turtle and Sea Horse level sponsors

Tuesday, September 17th Continued

12:30 - 1:30 p.m.

Choose from Concurrent Sessions

Sponsored by: PFM Asset Management

Municipal Bonding – Best Practices (Schooner Ballroom)

Presenter: Matthew Spoerndle, Phoenix Advisors and Christie Jean, Robinson and Cole

Basic overview of the debt issuance, management and monitoring process.

Government Banking- Fraud Trend Update and Best Practices (Clipper Ballroom)

Presenter: Warren Jones, Santander Bank

Industry wide fraud update and best practices to implement to prevent and manage security of banking relationships and products.

1:30 - 1:45 p.m.

Break

Sponsored by: Roosevelt & Cross

1:45 – 2:45 p.m.

Managing Vendor and Supplier Challenges (Schooner Ballroom)

Presenter: Chris Wardrop, USI Insurance Services, LLC

In this interactive session, case studies of vendor/supplier challenges will be covered. Learn to protect your municipality from cyber and other vendor risks.

2:45 – 3:45 p.m.

Federal Cash Credits for Green Energy Projects (Clipper Ballroom)

Presenter: Mike DePrima, CLA LLC

Municipalities all over the country are taking advantage of the Inflation Reduction Act legislation that offers tax credits in the form of direct cash payment from the IRS for green energy projects. Learn how you can get 30% or more of the cost of your project reimbursed.

6:00 - 10:00 p.m.

**Dinner, Drinks, and DJ Entertainment (Mystic Aquarium)
“Special Guests” Doug & Glenn**

Cocktail Reception sponsored by: QDS, Bartholomew & Co, Inc

Dinner sponsored by: TD Bank

Dessert and Bar sponsored by: Janney, Montgomery, Scott

Sunset Productions Entertainment sponsored by: Rockland Trust

“Special Guests” sponsored by: PKF O’Connor Davies

Fiducient Advisors

7:00 a.m. - 9:00 a.m.

Breakfast

Sponsored by: Unibank Fiscal Advisory Services

9:15 - 10:15 a.m.

So Far, So Good- The US Economy heading into 2025 (Schooner Ballroom)

Presenter: Steve Andrews, Webster Bank

10:15 - 10:30

Break

10:30 - 11:30 a.m.

Choose from Concurrent Sessions

The Benefits and Advantages of ERP Solutions for Tax and Assessment (Schooner)

Presenters: Leo DiNicola, Quality Data Services and Raymond Rob, Zobrio, Inc.

Learn about updates in assessment and collection technology and how municipalities can move data from the tax office to the general ledger automatically saving valuable reconciliation time

Competitive Municipal Bond and Note Auction Options (Clipper Ballroom)

Presenter: John McCarthy, Grant Street Group

This session will help you understand the ins and outs of online bond auctions.



Thank you for joining us. Safe travels home! We hope to see you next
year for our
78th Annual Fall Conference - Jay Peak, VT
September 14 - 17, 2025



Conference Cooler Bags sponsored by Scott + Scott Law Firm

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