

aim

15th Annual
Clerk-Treasurers
School &
Annual Budget
Workshops

Aim 15th Annual Clerk-Treasurers School

Wednesday, May 16, 2018 Embassy Suites by Hilton Noblesville ♦ 13700 Conference Center Drive South ♦ Noblesville, IN 46060

This workshop allows new and experienced clerk-treasurers to develop in their profession. Experts will cover topics such as investing public funds, the census, INPRS modernizations, and debt management. Don't miss *Municipal Government Trivia*, where we will answer clerk-treasurers most pressing questions.

AGENDA

9:00 a.m. – 9:30 a.m.	Registration
9:30 a.m. – 9:45 a.m.	Welcome and Opening Remarks
9:45 a.m. – 10:45 a.m.	Wise Ways to Invest Public Funds Regardless of size, each community needs a strategy for investing public funds. Participants will learn from municipal financial advisors and investment experts regarding their authority and options for wisely exercising their duties as sound fiscal managers.
10:45 a.m. – 11:00 a.m.	Break
11:00 a.m. – 12:00 p.m.	The Census Bureau and Local Governments – More than a Population Survey By far, the U.S. Census Bureau is known for their role in assessing our country's population every ten years. Did you know the Bureau has an entire division dedicated to collecting data from state and local governments? The Census of Governments collects and distributes data on fiscal health, tax structures, criminal justice, education, and much more. Get familiar with the data and why the Census matters to all of us!
12:00 p.m. – 1:00 p.m.	Luncheon

1:00 p.m. – 2:00 p.m.	This is <i>Municipal Government Trivia!</i> Whether you are new to the position or you're more in the Tom Brady category for longevity, there is always more to learn about your role as a public servant. This fun, fast-paced trivia game will pose some of the most common or critical questions to our panel of experts, ensuring you walk away informed and entertained!
2:00 p.m. – 2:15 p.m.	Break
2:15 p.m. – 3:15 p.m.	INPRS Modernizations Update In early 2018, Indiana Public Retirement System (INPRS) unveiled a new website. The website was designed to offer INPRS users more digital tools for managing retirement funds and applying for benefits. Attendees will receive an update on the new system and get a chance to ask any lingering questions.
3:15 p.m. – 3:30 p.m.	Break
3:30 p.m. – 4:30 p.m.	Debt Management Strategies for all Municipalities As with individuals and corporations, municipalities have debt. And managing such debt is about more than understanding cash flow. Learn how to strategically manage your debt to avoid surprises and prepare for whatever comes your way.
4:30 p.m.	Adjourn

*Check the Aim website for the latest event information and speaker details.

Indianapolis Budget Workshop & Clerk-Treasurers School Hotel Reservations

Embassy Suites by Hilton Noblesville
13700 Conference Center Drive South
Noblesville, IN 46060
1-800-362-2779
Group Code: Aim

Aim Rate: \$149 plus tax

Check-in: 4:00 p.m. **Check-out:** 11:00 a.m.

Please contact the Embassy Suites directly for hotel reservations and request the Aim group code. Hotel reservations should be made no later than Wednesday, April 25. Reservations can also be made online at aimindiana.org/members/events/clerk-treasurers-school. All hotel rooms in this brand new hotel include complimentary wifi, breakfast and evening reception. Aim is not responsible for hotel reservations or cancellations. Complimentary surface parking available onsite.

Pre-Registration Deadline

The deadline for pre-registration is (4) business days prior to each event. Pre-registration is strongly recommended.

SBOA Called Meeting

The Aim Annual Budget Workshop is a called meeting of the State Board of Accounts. Indiana law (IC 5-11-14-1) allows for city and town officials who attend called meetings to pay for registration or be reimbursed for travel expenses from the General Fund from any money not otherwise appropriated. Further, the law specifies that a claim for registration and travel expenses incurred while attending a called meeting may not be denied by the body responsible for the approval of the claim if the claim complies with IC 5-11-10-1.6 and IC 5-11-14-1.

Cancellation Policy

Only written cancellations will be accepted. Please mail your written cancellation to 125 W Market Street, Suite 100, Indianapolis, IN 46204, fax to (317) 237-6206 or email to aspurgeon@aimindiana.org Written cancellations received five business days prior to the event will be refunded, minus a \$40 cancellation fee.

E-Verify

Aim is an enrolled employer in the E-Verify Program verifying the work eligibility of its new employees and will remain so until that program no longer exists.

Aim Annual Budget Workshop

This is a must attend event for anyone involved with the budgeting process – mayors, council members, fiscal officers, deputies, and more. This workshop will advise municipal officials of recent legislative action that affects budgeting, and will also cover how to budget for 2019. A called meeting of the State Board of Accounts, the morning will cover a variety of topics, including MVH/LRS reporting and statutory requirements, Gateway reporting, ordinances and resolutions, and 1031 resolution of findings. The afternoon will teach the budgeting process from start to finish and the role played by each municipal member.

Offered in 5 Regional Locations

**All events are on local time. Please note time zone indicated.*

Lawrenceburg (EST)

Monday, April 23

Lawrenceburg Event Center
91 Walnut Street
Lawrenceburg, IN 47025

Jasper (EST)

Tuesday, April 24

KlubHaus 61
2031 Newton Street
Jasper, IN 47546

Fort Wayne (EST)

Tuesday, May 1

Grand Wayne Convention Center
120 W Jefferson Boulevard
Fort Wayne, IN 46802

Munster (CST)

Wednesday, May 2

Centennial Park Clubhouse
1005 S Centennial Drive
Munster, IN 46321

Noblesville (EST)

Thursday, May 17

Embassy Suites by Hilton Noblesville
13700 Conference Center Drive South
Noblesville, IN 46060

AGENDA	
9:00 a.m. – 9:30 a.m.	Registration
9:30 a.m. – 9:45 a.m.	Welcome and Opening Remarks Matt Greller, Chief Executive Officer, Aim Linda Sanders, Wessler Engineering
9:45 a.m. – 12:30 p.m.	SBOA Called Meeting <ul style="list-style-type: none"> • Ordinances and Resolutions • MVH/LRS Reporting & Statutory Requirements • 1031 Resolution of Findings • Gateway Reporting Todd Caldwell, Director of Audit Services, State Board of Accounts Susan Gordon, Director of Audit Services, State Board of Accounts
12:30 p.m.– 1:30 p.m.	Luncheon & Managing Legislative Changes Rhonda Cook, Deputy Director and Chief Federal and State Policy Officer, Aim Brian Gould, Director of Government Affairs, Aim Lindsey Moss, Assistant Government Affairs Director & Legislative Counsel

1:30 p.m. – 4:00 p.m.	2019 Budgeting <ul style="list-style-type: none"> • Budget Preparation Strategies • Your Budget and Road Improvement (MVH/LRS) Reporting Best Practices • Taking your Budget to the Next Level (Long Term Planning) Paige E. Sansone, CPA, Partner, Umbaugh Eric J. Walsh, CPA, Partner, Umbaugh
4:00 p.m.	Adjourn



Earn MMI Credit

Participation in the Aim Annual Budget Workshops are eligible for Municipal Management Institute (MMI) credit. Thank you to MMI sponsor Wessler Engineering.



2018 Annual Budget Workshops & Clerk-Treasurers School

Name		Title	
Municipality/Company			
Address		City/Town	
State	Zip	Phone	
Email			
Special Needs and Dietary Restrictions			
Budget Workshop			
<input type="checkbox"/> \$119 – Aim Member		<input type="checkbox"/> \$175 – Non-Member	
Location: <input type="checkbox"/> Lawrenceburg <input type="checkbox"/> Jasper <input type="checkbox"/> Fort Wayne <input type="checkbox"/> Munster <input type="checkbox"/> Noblesville			
Clerk-Treasurers School			
<input type="checkbox"/> \$119 – Aim Member		<input type="checkbox"/> \$175 – Non-Member	

Method of Payment		Total: \$	
Circle One:	Check	MC	Visa Discover AmEx
Check Number (Payable to Aim)			
Card Number			
Expiration Date			
Verification Code			
Name of Cardholder			
Billing Address			
City		State	ZIP
Authorized Signature			



125 W Market Street, Suite 100
Indianapolis, IN 46204



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