



17th ANNUAL CLERK–TREASURERS SCHOOL

THURSDAY, JUNE 18, 2020

AGENDA

9:00 a.m. – 9:10 a.m. **Welcome and Opening Remarks**
Matt Greller, Chief Executive Officer, Aim

9:10 a.m. – 10:10 a.m. **Insurance and Risk Management for Municipalities**

Liability insurance for municipalities is very different from that used in the private sector. This workshop will point out some of those differences and important issues to consider when making an insurance buying decision.

Presenters:

Tim Drury, Manager – Risk Management, Bliss McKnight, Inc.

Frank Pinson, Vice President – Sales, Bliss McKnight, Inc.

10:10 a.m. – 10:20 a.m. **Q&A**

10:20 a.m. – 10:25 a.m. **Break**

10:30 a.m. – 11:30 a.m. **COVID–19 Financial Planning – Reopen, Recover, and Reset (“R3”)**

This one–hour webinar will focus on financial impacts local governments may face as a result of the COVID–19 pandemic.

Panelists will explore potential revenue reductions, federal and state funding, expenditure planning and proactive ways to Reopen, Recover and Reset your community's financial roadmap. For those who attended the Aim Annual Budget e-Workshop webinar on April 29, you received a precursor from Paige and Eric on this topic. The R3 workshop will provide a deeper dive.

Presenters:

Allison Huenemann, Manager, Baker Tilly Municipal Advisors, LLC

Paige E. Sansone, CPA, Partner, Baker Tilly Municipal Advisors, LLC

Eric J. Walsh, CPA, Partner, Baker Tilly Municipal Advisors, LLC

11:30 a.m. – 11:40 a.m.

Q&A

11:45 a.m. – 12:40 p.m.

Lunch Break (Networking Opportunities)

12:45 p.m. – 1:45 p.m.

Indiana Public Retirement System (INPRS) and Public Employees Retirement Fund (PERF)

This PERF presentation will provide attendees with general historical information regarding the Indiana Public Retirement System and PERF. Additionally, the presentation will cover PERF benefit information and the options that will be available to members as they approach retirement, as well as the process a member can expect to go through as they continue in their career.

Presenter:

Kevin Marshall, Retirement Services Consultant, INPRS

1:45 p.m. – 1:55 p.m.

Q&A

1:55 p.m. – 2:00 p.m.

Break

2:05 p.m. – 3:05 p.m. **Utility Billing and Delinquency**

Much as happened in recent years regarding what a municipality can do to recover the delinquent utility payments of bad actors. This class will bring you up to speed on legislative changes and best practices in utility billing and collections – the good, bad, and ugly!

Presenters:

Chris Janak, Attorney, Bose McKinney & Evans LLP

Lindsey Moss, Chief Government Affairs Officer & Legislative Counsel, Aim

Jeff Rowe, Partner, Baker Tilly Municipal Advisors, LLC

3:05 p.m. – 3:15 p.m. **Q&A**

3:15 p.m. – 3:25 p.m. **Break**

3:30 p.m. – 4:30 p.m. **Preparing for your SBOA Audit**

During this presentation both new and seasoned Clerks and Clerk–Treasurers will gain valuable insights in preparing form, living through and life after an audit from the State Board of Accounts. Helpful tips will be provided; best practices will be shared and your questions will be answered. Most importantly any fears and/or impending anxieties will be relieved.

Presenter:

Jim Higgins, Partner, LWG CPAs & Advisors

4:30 p.m. – 4:40 p.m. **Q&A**

4:45 p.m. **Adjourn**