

IGFOA 2024 ANNUAL CONFERENCE SPEAKER INFORMATION

Lewie Alfano, Senior Solutions Advisor, ClearGov

Lewie Alfano is a Senior Solutions Advisor for ClearGov, having been with the organization for 6 years. Lewie has had the pleasure of speaking with thousands of local governments and counties across the country and helping many, including dozens in Illinois, to modernize the way they build and display their budget. Lewie has witnessed first-hand the evolution of the digital impact on local government and believes that all municipalities deserve tools that help make their lives a bit easier.

Kim Auchstetter, Finance Director and Treasurer, Village of New Lenox

Kim Auchstetter is the Village of New Lenox's finance director having been in this role since 1992. Prior to this position, she was employed as an auditor for Wilkes Besterfield, which later merged with McGladrey & Pullen, from 1988 to 1992. Kim currently serves as the treasurer of the Police Pension and Corporate funds of the Village of New Lenox. Kim is a member of GFOA and IGFOA since 1992, having served as IGFOA president from 2012-2013, and as an executive board member since 2006. Kim graduated from Northern Illinois University in De Kalb with an accounting degree. She obtained certification as a licensed CPA in November 1988.

Maureen Barry, Senior Consultant, MGT

Maureen Barry is a Senior Consultant with MGT (formerly GovHR USA), working with public organizations to meet their management resources consulting needs. She has nearly 30 years of combined experience working for local governments, in both the public and private sectors. Since joining MGT in 2020, Maureen has conducted recruitments for all types of positions, particularly in the areas of Finance and Community/Economic Development, for municipal, county, state and other quasi-public and non-profit organizations in communities throughout the U.S. Midwest, East, and West. Prior to joining MGT, Maureen spent nearly 13 years as a Municipal Advisor providing consulting services to local government issuers/clients. She started her career in the public sector, working directly for three separate municipalities in Illinois and Arizona. Currently serving as President of the Chicago Chapter of Women in Public Finance, Maureen is a longtime member of IGFOA, GFOA, and WPF.

Michelle Binns, Director, PFM Asset Management

Michelle Binns joined PFM Asset Management in 2006 and is a director staffed in the Chicago office. In her current capacity, Michelle works closely with a variety of local government clients in Illinois to develop and implement prudent investment strategies for short, intermediate, and long-term funds, including fixed income and multi-asset class portfolios. Her responsibilities include investment performance analysis, cash flow modeling, portfolio structuring and restructuring, providing economic summaries and research, and evaluating investment policies and practices for compliance with state investment statutes. Michelle serves on the IGFOA Executive Board and chairs the Partners' Forum.

Dr. Beverly Bunch, Professor, School of Public Management and Policy, University of Illinois, Springfield

Beverly Bunch is a Professor in the School of Public Management and Policy at the University of Illinois Springfield (UIS) with a joint appointment in the Center for State Policy and Leadership. She teaches public budgeting and conducts research on state and local government budgeting and capital financing. Beverly recently worked with the Volcker Alliance on several state budgeting research projects. Earlier in her career, Beverly worked for the City of San Antonio Office of Budget and Management, the Texas Bond Review Board, and GFOA.

Anthony Cervini, CPA, CFE, Partner-in-Charge, Government Services, Sikich LLP

Anthony Cervini, CPA, CFE, is responsible for providing technical services to Sikich's governmental clients in all areas of governmental accounting, auditing, financial reporting, budget development, internal controls, revenue and expenditure forecasting, and cash and debt management. Anthony has participated in hundreds of audits of municipalities and other governmental entities since beginning his career with Sikich in 2005. He has also served as lead instructor for governmental accounting, auditing, financial reporting, cash management and internal control courses internally and throughout the country. Anthony serves as a member of the GFOA Special Review Committee, the Illinois CPA Society Government Report Review Committee, and IGFOA's Partners' Forum.

Brad Cole, Executive Director, Illinois Municipal League (IML)

Brad Cole serves as executive director of the Illinois Municipal League, which is the statewide association of 1,298 cities, villages, and towns. The League's mission is to articulate, defend, maintain, and promote the interests and concerns of Illinois communities. Previously, Brad was Senior Vice President of Pepsi MidAmerica, a privately-owned soft drink bottling and distribution business servicing a five-state franchise territory. His duties involved supervision of all aspects of the company, including finance, administration, human resources, fleet management, equipment services, and sales. Prior to entering the private sector, he worked as Downstate Director for U.S. Senator Mark Kirk, of Illinois. In that position, he was a key member of the senator's senior management team and was responsible for strategies initiative, outreach and constituent services in 95 (of 102) counties of Illinois. Brad served as Mayor of the City of Carbondale, Illinois for two four-year terms, which followed one four-year term on the City Council.

Before entering local government service, Brad was Deputy Chief of Staff to Illinois Governor George H. Ryan. He directly advised the Governor and coordinated the administration of government services relative to the southern 40 counties of Illinois. Active as a leader for numerous public and private organizations, he has served on a library board, a park district board, a school board, a regional healthcare system board, a multi-state economic development commission, and in many other similar posts. He has been appointed to commissions by four of the past five Governments of Illinois and was nominated to national board appointment by President George W. Bush. He is Chairman Emeritus of Sister Cities International (a citizen diplomacy organization based in Washington, DC), having served two years as chairman of its global board of directors. Brad is a graduate of Southern Illinois University at Carbondale with a bachelor's degree in a double major of Political Science and Biological Science, and a Master of Legal Studies degree from the SIU School of Law.

Dave Cook, Executive Director, IPBC

Dave Cook has served as the first executive director of the Intergovernmental Personnel Benefit Cooperative (IPBC) since July 2013. Previously, he worked in local government throughout Illinois for 29 years and retired as the Village Manager of Hinsdale in 2013. Dave has previously served as Chairman of the Illinois Metropolitan Investment Fund and President of the Illinois Government Finance Officers Association. He has a BS in Accounting from Eastern Illinois University. Dave currently resides in Lake Villa, IL along with his husband Brian, and their main hobby is breeding and showing dogs. He is also an AKC licensed judge.

Kyle Cratty, Finance Director/Comptroller, City of Peoria

Kyle Cratty currently serves as the Finance Director/Comptroller for the City of Peoria, where he is responsible for all City finance functions including budget, financial management, treasury management, accounts receivable, and purchasing. Prior to his position with the City, Kyle spent 10 years in multiple roles including eight years as the Finance Director for the Park District of Oak Park. While at the Park District, Kyle wore many hats overseeing financial operations, information technology, data, strategy, and innovation as well as overseeing multiple software implementations. He also spent a few years in the private sector consulting for smaller government finance offices. Kyle has a bachelor's in economics and finance from St Ambrose University and a master's in public administration from Northern Illinois University. Kyle currently serves as the Secretary for the Downstate Chapter of the IGFOA.

Kent Floros, Partner, Chapman and Cutler LLP

Kent Floros is a partner in Chapman and Cutler LLP's Illinois Public Finance Department. Kent serves as bond counsel, underwriters counsel, and disclosure counsel in governmental purpose securities transactions. He routinely advises issuers, investment banks, commercial banks, and financial advisors on state law and federal tax law matters related to the structure and sale of governmental obligations. Kent also provides legal assistance with respect to securities law matters, including SEC and MSRB rules and regulations governing the municipal securities market. Kent is also a Certified Public Accountant registered in the State of Illinois.

John Harrington, Director of Finance, Village of Woodridge

John has been very involved with the IGFOA serving on the Executive Board, Membership Committee, the South Metro Chapter Board, and as the immediate past President. John is well versed in local government finance as he currently serves as the Finance Director for the Village of Woodridge and worked for 16 years as the Finance Director in the Village of Minooka. John received his Bachelor of Science degree in Accounting from North Central College in Naperville and is a CPA. John is a member of the Illinois Municipal Treasurers Association (IMTA) and also serves on the Rainbow Council BSA Board of Directors and is the Council Treasurer.

Brian Hextell, Institutional Portfolio Manager, PMA Asset Management

Brian Hextell joined PMA Asset Management in 1999 and has senior portfolio management accountabilities for assigned cash, fixed income, and asset allocation mandates. Brian also leads PMA's institutional portfolio management team, guiding the firm's client service efforts and delivering successful outcomes for the firm's client's base. Prior to Brian's leadership and portfolio management roles, he led PMA Financial Network's credit risk management department supporting the overall firm's financial institution research effort. Brian earned his BS in Finance from Northern Illinois University and an MBA from DePaul University.

Patrick Ibarra, Co-Founder & Partner, Mejorando Group

As Co-Founder and Partner in the Mejorando Group, Patrick Ibarra is an architect of innovation and entrepreneur of ideas who seeks to challenge the status quo thinking of "we've always done it that way" and replace it with a modern approach to continuous improvement. Patrick is one of the nation's leading experts on government succession and workforce planning and has designed and implemented organization-wide programs for public-sector agencies. Patrick holds two advanced degrees, a master's in public administration and a master's in organizational development. A frequent speaker at conferences of professions within government including ICMA, NLC, GFOA, Patrick shares practical strategies with leaders in their pursuit to move their organization forward in all directions. He also authors articles offering specific actions government leaders can implement to immediately improve organizational performance.

Shayne Kavanagh, Senior Manager of Research, GFOA

Shayne Kavanagh is the Senior Manager of Research for GFOA and a leader in developing the practice and technique of long-term financial planning and policies for local government. He started GFOA's long-term financial planning and policy consulting offering in 2002 and has been working with governments on financial planning and policies ever since. Shayne has worked with many governments of different sizes and types on financial planning and policies across the United States and Canada. His financial planning experience also drives his research at GFOA. Shayne is the author of a number of influential publications on financial planning. Prior to joining GFOA, Shayne served as the Assistant Village Manager for the Village of Palos Park, Illinois, where he was responsible for managing all aspects of financial management operations, including budgeting, utility billing, payroll and accounting. He received his MPA degree from Northern Illinois University.

Maria Kersey, Certified Financial Planner™ (CFP), MissionSquare Retirement

Maria Kersey has been in the financial services industry for over 30 years. She spent 10 years with the Vanguard Group working in the participant services call center. There, Maria managed associates who handled 401(k) and 403(b) participants. She also spent 20 years at TIAA where she served as a Financial Consultant providing advice and guidance to 403(b) participants of higher education and the hospital market. Most recently Maria served as an independent Financial Advisor with Mass Mutual where she assisted individuals with their financial planning and insurance needs. Maria earned a dual Bachelor of Arts degree in Business/Communications from the University of Pittsburgh. Maria is a Certified Financial Planner™ and a registered financial representative who holds a Certificate in Financial Planning from Georgetown University as well as the FINRA SIE, Series 6, 7 and 63 Licenses. She also has the Life, Health and Long-Term Care Insurance Licenses.

Mike Kloack, Director, Advisory Services, Meeder Public Funds

Mike Kloack is a Director, Advisory Services with Meeder Public Funds and has over 25 years' experience serving public entities with their investment and related needs. He has an MBA with finance concentration from Spring Arbor University and extensive experience in cash flow, market analysis and client relationship management. He is a regular contributor to industry training events and instructs on a variety of topics related to public funds investing. Mike is an active member of Michigan and Illinois public entity associations.

David Krout, Managing Partner - Enterprise Applications Consulting, ClientFirst Technology Consulting

David Krout has 25 years of experience assisting local governments with a broad scope of information technology needs. He specializes in working with organizations to identify their strategic, organizational, application, and functional requirements to determine which system and/or specific applications are a proper fit for both the agency and the vendor. David's unique and diversified background in business management, accounting, and management consulting has given him the ability to collaborate with C-level executives and department staff from a practical, business-management perspective to maximize their technology utilization. Having also worked for a leading local government enterprise software provider, David brings a unique understanding of consulting, client representation, and vendor relationships to the collaboration between the agency and software vendors.

Nikki Larson, Deputy Village Manager/CFO, Village of Glencoe

Nikki Larson, CPA, CPFO, SPHR, is the Deputy Village Manager/Chief Financial Officer for the Village of Glencoe, where she has served since 2018. Prior to working for the Village of Glencoe, she was the Finance Director at the Village of Vernon Hills and the City of Highland Park. Nikki is a Certified Public Accountant, Certified Public Finance Officer and Certified Senior Professional in Human Resources. She has a Bachelor of Science in Business Administration/Accounting from Roosevelt University and a Master of Business Administration from Northern Illinois University. Nikki serves as Vice President of the IGFOA Executive Board and as the chair of the Growth and Engagement Committee. Nikki also serves on the Executive Board as President for the Geographic Information Systems Consortium (GISC).

Michael Malatt, CPA, Principal, Baker Tilly US, LLP

Michael Malatt has been a Principal with Baker Tilly and a member of the firm's Public Sector Practice Group since 2007. Michael has extensive experience providing financial and compliance audits, accounting services, and consulting services to state and local government organizations. Michael is also responsible for assisting in the implementation of GASB standards, including the development of practical implementation tools to providing in-depth training to firm staff and clients. Michael is a member of the Illinois CPA Society, AICPA, GFOA Special Review Committee, and IGFOA Professional Education Committee. Michael obtained a Bachelor of Business Administration in Accountancy and Mathematics and a Master of Science in Accountancy from the University of Notre Dame. Michael received the 2008 Excel Award from the Illinois CPA Society for outstanding achievement on the Uniform CPA Examination in Illinois.

Andy Masters, MA, CSP, Author, Speaker, Trainer, Masters Performance Improvement, Inc.

Andy Masters IGNITES a cultural transformation to cultivate & empower future leaders, to improve performance, advance business growth, and transform customer experience — all within a creative, & high-morale work environment. Andy is an award-winning author and international speaker who has written 5 books, earned 4 degrees, and has been featured on many major media outlets — including LifeTime Television, PBS, Investor's Business Daily, and Leadership Excellence magazine. Andy has earned the prestigious "CSP" award/designation of the National Speakers Association (NSA), the highest international recognition for professional speakers, in which less than 10% of over 5,000+ speakers worldwide have achieved. Andy is based in Orlando, Florida, and served as President of the NSA-Central Florida Chapter — representing 125+ authors, speakers, and experts in the region.

Andy's professional career included working for two high-profile performance improvement and marketing services firms, where his clients included Lexus, Honda, Nestle-Purina, and Anheuser Busch. Andy escaped the corporate world just in time to preserve his sanity, as he followed his passion for speaking, consulting, and entrepreneurship.

Gabe Phillips, Advisory Services Consultant, Meeder Public Funds

Gabe started his career with Meeder in 2022 as an Advisory Services Consultant. He came to Meeder from SS&C Technologies, where he was in Middle Office Trade Operations. Gabe graduated from the University of Cincinnati with a BA in Financial Planning and served as the President of Pi Kappa Phi.

Tom Reedy, Managing Director, Stifel Public Finance

Tom Reedy is a Managing Director with Stifel's Illinois public finance practice. He is based in Stifel's Chicago office. Mr. Reedy has worked with a variety of Illinois municipalities, counties, sanitary districts, school districts, college districts, park districts, fire districts, and library districts on both taxable and tax-exempt debt financings. Throughout his career, he has served as the lead banker on over \$1.8 billion of financings for local governmental entities in Illinois. Mr. Reedy began his career in public finance in 2011 with George K. Baum & Company, certain assets of which were subsequently acquired by Stifel in 2019. Mr. Reedy graduated from Indiana University with B.S. degrees in Finance and Entrepreneurship.

Kimberly Richardson, Assistant City Manager, City of Peoria

Kimberly Richardson is the Assistant City Manager for the City of Peoria, IL, and has nearly two decades of experience working in local government within the city manager's office. She holds a bachelor's degree and a master's degree in public administration from Northern Illinois University. Over several years, Kimberly has dedicated herself to advocating and supporting inclusive practices and policies that support women in the workplace, especially women of color. Kimberly is a current board member of ILCMA.

Natalie Schwarz, PMP - Management & Technology Consultant, Plante Moran

Natalie is a leader in Plante Moran's Information Technology Consulting Public Sector practice, with nearly 15 years of professional service experience assisting clients with digital transformation projects. Natalie specializes in assisting clients assess, plan for, select, and implement enabling technologies within the public sector. Natalie has a finance and technology background and is a certified project management professional (PMP). Natalie is a member of the national and Illinois Government Finance Officers Association (GFOA), located in the Chicago area.

Sarah Sullivant, Managing Director & Sector Lead – Americas Public Finance

Sarah Sullivant is Managing Director and Sector Lead for Americas Public Finance ratings, where she leads credit rating research and analytics for US local government and tax-secured ratings. Previously, she was a sector lead for public finance ratings in Canada and Latin America and directed the analytical governance function across S&P Global Ratings. In her more than 15 years of experience, Sarah has held different roles at S&P Global Ratings and in the market, including as a public finance credit analyst and in community development finance and ESG investing. She has been recognized by peers and investors as an outstanding municipal analyst in the US since 2018. Sarah holds a bachelor's degree from Rice University and a Master of Public Policy from the University of California, Berkeley.

Mitch Thompson, Director, CliftonLarsonAllen LLP

Mitch Thompson is a Director of Digital Growth for CliftonLarsonAllen LLP (CLA), focusing primarily on state & local governments where he supports data management, grants management, workflow automation, predictive analytics and machine learning. Collaborating with clients to make sense of their data to help make more effective, real-time decisions is his priority. Mitch is a retired police chief, having served for 29 years in various leadership roles for most of his career. Since 2018, he has been in technology consulting for all levels of government. Mitch has been on both sides of the project continuum, as the client and the vendor, giving him a unique capability to drive successful outcomes. Mitch received his Bachelor of Arts degree from Indiana University. He also has a Master of Science degree and is a graduate of the F.B.I. National Academy (Session 202) and the F.B.I. Law Enforcement Executive Development (Session 50) Seminar.

Patti Treibel-Leeds, MS, Master C3 Trainer and Independent Consultant

Patti Treibel-Leeds has been a Master C3 trainer since 2017, having trained over 750 de-escalation students. She has trained school districts, civic leaders, and mental health providers throughout central, northern and eastern Iowa, along with western Illinois. Patti has a BS in Human Services with a MS in Human Services with a specialization in Counseling Studies. She also facilitates training in Compassion Fatigue, Mental Health First Aid, and other topics.

Dalena Welkomer, Director, Baird Public Finance

Dalena Welkomer has been a member of Baird's public finance team since 2004. She has assisted many Illinois issuers with their bond transactions such as the villages of Bedford Park, Downers Grove, Heyworth, Oswego and Roanoke, the cities of Champaign, Decatur, DeKalb, East Peoria, Marengo, Peoria, St. Charles and Streator, and the counties of Edgar, Knox and Peoria. Her experience cuts across many types of financings, including general obligation, special revenue, special district, water and sewer, tax increment and pension bonds. Dalena serves on the Women in Public Finance Chicago Chapter Board of Directors, as co-chair of the IGFOA Partners' Forum and Regional Coordinator for the IGFOA Downstate Chapter, Central Region. Dalena graduated magna cum laude from Benedictine University in Lisle, Illinois receiving a Bachelor of Business Administration in Finance with a minor in International Business and Economics.

Jamie Wilkey, Audit Technical Partner, Lauterbach & Amen, LLP

Jamie Wilkey has over 23 years of professional accounting experience exclusively in the governmental sector. She has participated in numerous governmental engagements, including municipalities, park districts, school districts, libraries, and special districts. Jamie has extensive experience in the governmental sector, managing multiple units of government, conducting annual audits, single audits, TIF audits, and grant specific audits. Jamie has a strong background in government consulting, overseeing all financial operations such as general ledger maintenance, trial balance, balance sheet, and consolidated financials. Jamie has provided expertise in payroll processing, budget preparation, supervision of accounts receivable, accounts payable and utilities billing processing, tax levies, implementation of finance/accounting department procedures, and policies for numerous clients.

Brad Wilson, Finance Director, City of Wood Dale

Brad Wilson has been an integral part of the leadership team with the City of Wood Dale, Illinois, serving as the Finance Director. Prior experiences include the Village of Glenview, IL, and Smith Barney in their Operations and Compliance Division. Brad is a contributing member of the Government Financial Officers Association (GFOA), where he serves as a

budget-reviewer, Vice-Chair of the Small Government Forum, and has helped Wood Dale achieve the GFOA Triple Crown since its inception. In addition, he has served on the Executive Board of the Intergovernmental Personnel Benefit Cooperative for more than nine years, serving as Chair from 2017 to 2019. Brad is also a member of the IGFOA, where he previously served as President of the Chicago Metro Chapter Board.

Brad has a double Bachelor of Science in Finance and Economics from North Central College, a Master of Science in Accountancy from Roosevelt University, and has earned GFOA's CPFO designation.