



IGFOA Quad Cities Northwest Chapter presents
Lunch and Learn - Illinois Records Retention - Rules for Books and Boxes

Thursday, April 28, 2026

Johnny's Italian Steakhouse

AGENDA

April 28, 2026

11:30 AM - 11:50 AM	Registration and Networking
11:50 AM - 12:00PM	Lunch is served
12:00 PM – 1:00 PM	Illinois Records Retention - Rules for Books and Boxes Speaker(s): Steve Colaizzi, Senior Archivist for the Archival Program for the Illinois Secretary of State's Office

This seminar will present an all-encompassing look at the various deadlines and due dates faced by finance directors on a regular basis. A timeline will be created that includes State and Federal tax filings, TIF reporting, Treasurer's Reports, Comptroller's Reports, Department of Insurance Reporting, debt disclosure requirements, GFOA award program due dates, ACA, single audit, unemployment reports, IMRF reporting and more. Each reporting requirement will be discussed, the applicable due dates identified, and the ramifications for missing deadlines explained.

Learning Objectives

Participants completing this seminar should be able to:

- Discuss the various deadlines and due dates applicable to Illinois municipalities.
- Identify actions that will trigger the need for new filing and reporting requirements with various State and Federal agencies.
- Explain the potential ramifications for failing to meet required deadlines, the steps that need to be taken to have items added to the application, and how to locate a disposal certificate online, fill it out, and submit for approval.

NASBA CPE: Earn About 1.0 CPE **Program Level:** Overview **Field of Study:** Finance - Technical

IGFOA reserves the right to modify the agenda, sessions, and speakers



Learning • Connecting • Progressing

Speaker Bio

Steve Colaizzi is Senior Archivist for the Secretary of State's Office. He has 38 years of service with the Secretary of State's Archives focusing on Local Records Management. He has provided hundreds of hours of local records training, created thousands of agency Applications for Authority to Dispose of Local Records and Local Records Disposal Certificates, inspected and documented records damaged by fire and floods and met on site and presented to agencies and organizations throughout Illinois.