

Prioritize

*Insurance & Risk Management
in the New Economy*

**IGFOA
ANNUAL
CONFERENCE 2002**

ILLINOIS
GOVERNMENT
FINANCE
OFFICERS
ASSOCIATION

Recognize

*Revenue
Management
in the New
Economy*

PRIORITIZING...

WHAT'S IMPORTANT

RECOGNIZING...

WHAT'S NOT.

Debt Management & Bond Ratings in the New Economy

Saturday, September 21
Sunday, September 22
Monday, September 23
Tuesday, September 24
Collinsville, Illinois

**CONFERENCE
SCHEDULE**

*Pension Fund Management
in the New Economy*

Manage

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Prioritizing What's Important, Recognizing What's Not

Choose between the Financial Management Track, Strategic Planning Track, or mini-sessions. Please note that while you may mix attendance between the Financial Management Track and mini-sessions, participants in the Strategic Planning Track are encouraged to attend the entire series as these sessions build upon one another.

FINANCIAL MANAGEMENT TRACK

Session 1: Monday, 10:30 am to noon Insurance and Risk Management in the New Economy

The September 11, 2001 terrorist attacks have had a devastating affect on the insurance market. This session will highlight the options currently available for municipal insurance and the risk management techniques you can use to control costs. Information on recommended types of insurance and approaches to securing coverage will be provided as well.

Coordinator/Speaker: Michael D. Nugent, Nugent Risk Management Services

Speaker: Leonard J. Flood, Village of Lombard

Moderator: Daniel P. Wiersma, Village of Glenview

Session 2: Monday, 1:30 to 2:45 pm Pension Fund Management in the New Economy

This session will focus on understanding the risks in managing a municipal police or fire pension fund in today's market environment. The effect of market volatility on actuarial valuations, equity market risks, and bond market risks will be addressed. A panel will discuss steps that a plan sponsor should take to evaluate, monitor and control these risks.

Coordinator/Moderator/Speaker: Rick Potter, Becker Burke Associates

Speakers: Edward F. McKee, Jr., Village of Winnetka

Sandor Goldstein, Goldstein & Associates

James DeZellar, Chicago Equity Partners

Greg Hosbein, Segall Bryant & Hamill

Session 3: Monday, 3 to 4:15 pm Revenue Management in the New Economy

This session will address issues in revenue management that are particularly significant since the September 11, 2001 tragedy. The process that the Illinois Municipal League uses to estimate state-shared revenues and potential future projections will be discussed. Revenue diversification and enhancement strategies will also be addressed.

Coordinator/Moderator/Speaker: Dave Richardson, Village of Streamwood

Moderator/Speaker: Jim Egeberg, City of Des Plaines

Speakers: Larry Frang, Illinois Municipal League

Mark Nannini, City of Rolling Meadows

Session 4: Tuesday, 8:30 to 10:30 am Debt Management and Bond Ratings in the New Economy

This session will cover the basic reasons for debt issuance and how the economy affects the issuance process. Refundings, cash alternatives and use of special districts will be discussed. The bond rating process, trends in ratings and the impact of the economy on ratings will also be addressed.

Coordinator/Moderators: Kevin W. McCanna, Speer Financial

Spiro C. Hountalas, Standard & Poor's Ratings Services

Speakers: Elvira A. Hogan, City of Peoria

John H. Peterson, Legg Mason Wood Walker, Inc.

John Kenward, Standard & Poor's Ratings Services

STRATEGIC PLANNING TRACK

Strategic Planning for Local Government Monday, 10:30 am to 4:15 pm Tuesday, 8 to 10:15 am

The best way to predict the future is to create it. Strategic planning is a process that determines the future of an organization and what resources will be needed to ensure its success. The strategic planning process involves determining the organization's vision (belief system), mission (how the organization will meet its vision), and action steps (goals) that will enable the organization to capitalize on opportunities that exist. This track will be a primer in strategic planning. The track will be conducted during each of the concurrent sessions of the conference and each session will build upon the instruction of previous sessions. To obtain maximum benefit from the instruction, attendance at all sessions of this track is encouraged. Refer to specific days in this schedule for breaks and lunch times.

Moderator/Speakers: Gerald M. Houston, Houston Associates

Steven C. Reid, Houston Associates

MINI-SESSIONS

These 75-minute sessions will repeat throughout the day on Monday, September 23 and Tuesday, September 24. Offerings subject to change

Sharpen your Presentation with MS Powerpoint

How to produce audience-friendly presentations for financial and budgetary reports. Learn some nifty and quick short cuts to jazz up your next presentation using Microsoft Powerpoint. Class size limited to 12. Familiarity with PC and Windows required. Previous Powerpoint experience not necessary.

Coordinators/Presenters: Ted Steinbrecher, President, Group 1 Resources, Inc.

Kathryn Booth, Finance Director, Village of Bartlett

Excel Spreadsheets

Spreadsheets are the workhorses of government finance. How can you take advantage of the power of spreadsheets to get your work done? Join us for quick tips and tools for analysis and reporting using MS Excel. Class size limited to 12. Familiarity with PC and Windows and basic understanding of how to use spreadsheets required.

Presenter: Selena Elledge, Sikich Group, LLC

Prioritizing What's Important, Recognizing What Isn't

Monday, 1:30-2:45 pm; repeats at 3-4:15pm in the Mississippian Room

Examine how to better align your priorities with how you really spend your time and tips for coaching staff to focus on priorities.

Facilitator: Roger Breisch, The Webber Group, Inc.

What Blocks Decision Making — How to get over the Hurdles

Tuesday, 9-10:30 am in the Cahokia Room

What gets in the way of making decisions and moving on? How can you overcome the roadblocks to getting on with the business at hand?

Facilitator: Roger Breisch, The Webber Group, Inc.

Conference Q & A

What does my Conference Registration include?

Conference Registration includes admittance to any of the Conference sessions on Sunday, September 22 through Tuesday, September 24, the IGFOA Annual Business Meeting, and the Vendor Showcase. Registration also includes the following meals and social events:

Sunday, September 22: Welcome Reception, Ice Cream Social and Hospitality Suite;
Monday, September 23: Recognition Luncheon, Night at the Ballpark;
Tuesday, September 24: Brunch.

The following events require separate registration and payment:

- Basic Governmental Accounting Seminar, Friday, September 20
- Pre-Conference Seminar, Saturday, September 21
- Saturday Night Dinner, Saturday, September 21
- Conference Golf Outing at Fair Oaks Golf Club, Sunday, September 22
- Cahokia Mounds Tour, Sunday, September 22

Do I have to wear my nametag?

Nametags are required for admittance to all Conference sessions, meals, and activities. Some activities may require separate tickets. Nametags and tickets will be provided at Conference check-in.

Unless otherwise noted, all sessions will be held at the Gateway Center Collinsville.

Your feedback and suggestions are important! Be sure to complete and return your Conference Evaluation form!

Keynote speaker: Jack B. Evans

Jack Evans is President of The Hall-Perrine Foundation, a private philanthropic corporation in Cedar Rapids. Prior to joining the Foundation in January 1996, he was President and Chief Operating Officer of SCI Financial Group.

Mr. Evans sits on the Boards of Alliant Energy, The Federal Reserve Bank of Chicago, Gazette Communications, Nuveen Institutional Advisory Corporation, Priority One, and United Fire and Casualty. He is a former member of the Chicago Stock Exchange and a part-time instructor and member of the Advisory Council of the Department of Finance in the College of Business at the University of Iowa.

SESSION SPEAKERS

Kathy Booth is Finance Director for the Village of Bartlett and previously served as Finance Director for the Village of Roselle. She is a Member-at-Large of the Illinois GFOA Executive Board and has served on the Chicago Metro Chapter of IGFOA and as chair of the IGFOA Certification Committee.

Roger Breisch is co-founder of The Webber Group, Inc., which specializes in organizational, personal and interpersonal effectiveness. He previously taught mathematics and computer science at The Hun School of Princeton. He founded the Midwest Organizational Learning Network.

James Dezellar, CFA is a Director of Chicago Equity Partners, where he is responsible for client servicing and institutional asset management business development. He holds a BS Degree in Finance from Ohio State University and is a Chartered Financial Analyst.

Friday, September 20 Pre-Conference activities

9 am to 4 pm

Basic Governmental Accounting Seminar
6 CPE

Holiday Inn Collinsville
Instructor: Gary Neubauer, Sikich Group, LLC

Saturday, September 21

10 am to 4 pm

Practical Economics for the Finance Officer Pre-conference Seminar
5 CPE

LaSalle Room
Coordinators: Mark Lyons, Village of Downers Grove
Instructors: Dr. Michael Peddle, Northern Illinois University
Dr. John Lewis, Northern Illinois University

6:30 to 9 pm TBA

Informal Pre-Conference Dinner

At an area restaurant
Cost not included in conference fee – ranges from \$10 to \$25.
Meet in Holiday Inn Lobby at 6:15 pm for an informal carpool.
Coordinator: Conference Social Committee

Agenda, times and events subject to change — check signs on-site

“Every season has its peaks and valleys. What you have to try to eliminate is the Grand Canyon.

—*Andy Van Slyke, St. Louis Cardinals outfielder*

Sunday, September 22

9:00 am

Conference Golf Outing
Foursome Scramble at Far Oaks Golf Club
419 Old Collinsville Rd • Caseyville, IL 62232
(618) 628-2900

Shotgun start at 10 am; golfers should register at the course by 9:00 am.

Lunch and golf carts will be provided at the course.

Coordinators: Dallas Whitford, City of Springfield
Gary Karsha, Capital Gains, Inc.

10 am

Cahoika Mounds State Park Tour
Tour and walk to Mounds.
Bus departs from Holiday Inn Collinsville.
Bus returns to Holiday Inn until 1:30 pm.
Coordinators: Conference Social Committee

1 to 6 pm

Vendor Showcase
Center Hall A
Visit to collect *Vendor Bingo* points!

2:30 to 4 pm

Ice Cream Social
Center Hall A
Sweet treats and a chance to peruse the largest IGFOA Conference Vendor Showcase yet!

4 to 7:30 pm

Welcome Reception
LaSalle Room
Lots of refreshments and expanded appetizers. Catch up with colleagues and make new friends.

Looking for more to eat? Check out recommendations for dining on your own in the Collinsville area along with other off-site entertainment must-sees provided at the Welcome Reception.

9:30 pm to Midnight

IGFOA Hospitality Suite
Holiday Inn Collinsville

A note about Monday's breakfast:

Each of the Conference hotels' room charge includes continental style breakfast. (The Holiday Inn offers a full breakfast for \$3 more.) In addition, the IGFOA Women's Network is sponsoring a breakfast meeting Monday morning. Sweet dreams!

Monday, September 23

7 to 8:30 am

Women's Network Breakfast

GASB 34 Implementation Lessons Learned

Marquette Room

Experiences from the forefront of implementing the New Reporting Model. All welcome!

Speakers: Kathleen Walsh, Director, KPMG, LLP

Mary Johnson, Assistant Finance Director, Village of Streamwood

8 am to 5 pm: Vendor Showcase

Center Hall A

Vendor Bingo continues during morning and afternoon breaks at Showcase.

8:45 to 10:15 am

Opening Session & Remarks

LaSalle Room

IGFOA President Mary Dankowski, Deputy Village Manager/Finance, Village of Park Forest

Opening Session and Keynote Address: Reflections of a Federal Reserve Bank Director (1.5 CPE)

Keynote Speaker: Jack B. Evans, Director, Chicago Federal Reserve Board

Mr. Evans, a Director of the Federal Reserve Bank of Chicago, will offer insights into the Federal Reserve System and how local governments are affected by it. He will outline the history of the system, relate major observations, and discuss the relationship between economic activity and the Federal Reserve Bank Board policy.

Moderators: IGFOA Conference Chair Brian Barnes, Finance Director, City of Bloomington IGFOA Conference Program Chair Brian Caputo, Director of Finance/Treasurer, City of Aurora

10:15 to 10:30 am: Morning Break

Enjoy a morning snack and visit the Vendor Showcase.

Center Hall A

10:30 to 11:50 am

Concurrent Sessions *

Insurance & Risk Management in the New Economy (1.5 CPE)

LaSalle Room

Strategic Planning (1.5 CPE)

Marquette Room

Mini Session: MS PowerPoint (1 CPE)

Cahokia Room (begins at 10:40 am)

Noon to 1:15 pm

IGFOA Recognition Luncheon

Holiday Inn Collinsville Ballroom Luncheon and volunteer recognition.

*Refer to description of Concurrent Session Schedule

1:30 to 2:45 pm

Concurrent Sessions*

Pension Fund Management in the New Economy (1.25 CPE)

LaSalle Room

Strategic Planning (1.25 CPE)

Marquette Room

Prioritizing What's Important (1.25 CPE)

Mississippian Room

Mini Session: MS Excel (1 CPE)

Cahokia Room (begins at 10:40 am)

2:45 to 3:00 pm: Afternoon Break

Center Hall A

Enjoy pre-game snacks in the Vendor Showcase.

3:00 to 4:15 pm

Concurrent Sessions *

Revenue Management in the New Economy (1.25 CPE)

LaSalle Room

Strategic Planning (1.25 CPE)

Marquette Room

Prioritizing What's Important (1.25 CPE)

Mississippian Room

Mini Session: MS Powerpoint (1 CPE)

Cahokia Room (begins at 3:10 pm)

4:15 to 5:00 pm

Roundtable Discussions (0.5 CPE)

LaSalle Room

Opportunities for one-to-one interface and discussion with today's session speakers.

4:15 to 5:00 pm

Auditor Independence—The Local Government Perspective (0.5 CPE)

Mississippian Room

Join a discussion on the impact of recent changes in audit standards and how they impact local government.

Discussion Leader: Irwin Lyons, Director of Government Services, Miller, Cooper & Company, Ltd. Sponsored by IGFOA TARC

4:15 to 5:00 pm

Women's' Network Planning Meeting

Illini A Room

Coordinator: Julie O'Brien, Lake County

IGFOA Night at the Old Ballpark

Food, fun, and fanfare at the Ballpark as the St. Louis Cardinals take on the Arizona Diamondbacks. Buses depart from the Gateway Center beginning at 5:15 pm; two-hour Buffet dinner provided at the stadium beginning at 7:10 pm. Beer and soft drinks provided through the 8th inning. Game ticket included. Buses make return loop to the Landing in St. Louis and Holiday Inn Collinsville beginning at 8:30 pm, every hour until ballgame concludes.

Session Speakers, cont'd.

Jim Egeberg is Director of Finance & Administrative Services for Des Plaines, a community of 58,720 with an operating and capital budget of over \$94 million. Jim is a Certified Government Finance Officer and a member of the GFOA's special review committee for its CAFR certificate program.

Leonard J. Flood, Director of Finance/Treasurer for the Village of Lombard, has over 24 years of experience in municipal finance and related areas. Len has received recognition from GFOA of the United States and Canada for excellence in financial reporting and budgeting.

Larry Frang is Asst. Executive Director of the Illinois Municipal League. He was previously Director of Fiscal Programs, Risk Management Coordinator, and Assistant Managing Director of the Illinois Municipal League Risk Management Association. He holds a BA and an MA in Economics.

Sandor Goldstein, F.S.A. serves as the consulting actuary for a number of major public pension funds in Illinois, including various police and firefighters' pension funds. Mr. Goldstein has also served as consulting actuary to a number of organizations involved with public pension funds.

Elvira A. Hogan, CPA is Finance Director/Comptroller for the City of Peoria. She was previously Finance Director for the Village of Romeoville, Village of Villa Park, Village of Richton Park and Deputy Auditor for the County of Will. She coauthored *A Reporting Guide to Illinois Special Districts*, an ICPAS Publication.

more speakers next page

Session Speakers, cont'd.

Gerald Houston is founder and president of Houston Associates, providers of strategic planning, management development, customer service workshops and coaching. He is a certified quality improvement facilitator and a Certified Professional Behavioral and Values Analyst.

Kevin W. McCanna is President and owner of Speer Financial. He has experience in providing financial advisory services to a broad spectrum of governmental clients throughout the Midwest. He is a Certified Independent Public Financial Advisor and a Chartered Financial Analyst.

Edward F. McKee, Jr., is Finance Director and Treasurer of the Village of Winnetka. He has been active as the treasurer of two public insurance pools, the Intergovernmental Risk Management Agency (IRMA) and High Excess Liability Pool (HELP).

Mark F. Nannini, Finance Director for the City of Rolling Meadows, is a Certified Illinois Municipal Treasurer, Chairperson for IGFOA's Career Development Committee, Past Chairperson for the Ad-Hoc Publication Committee, National Budget Reviewer for Government Finance Officers Association, and an Urban Innovation Award Winner.

Mike Nugent is founder and owner of Nugent Consulting Group, an insurance and risk management consulting firm. Mike holds the professional designation of Associate in Risk Management (ARM) and is working toward the designation of Certified Property and Casualty Underwriter (CPCU).

Jeff Panger is a director in Standard and Poor's Public Finance Department, where he is lead analyst for many major issuers in the Midwest. He served as an Assistant to the New York City Deputy Mayor for Finance and Economic Development, and as an analyst at the NYC Office of Management and Budget.

more speakers next page

Tuesday, September 24

8:00 am to 8:30 am Meet the IRS

Cahokian Room
Internal Revenue Service Tax Exempt/Government Units—Meet Ted Knapp, IRS, who works with federal, state and local government and learn about their current focus.

8:00 am to 10:30 am: Vendor Showcase

Center Hall A
Last chance to play Vendor Bingo and enter the drawing!

8:00 to 10:30 am Concurrent Session * Strategic Planning (2.5 CPE)

Marquette Room

8:30 to 10:30 am
Concurrent Session (2 CPE)*
Debt Management in the New Economy
Mississippian Room

9 to 10:30 am
Mini-session: What Blocks Decision Making (1.5 CPE)
Cahokian Room

10:30 to Noon
IGFOA Brunch and Annual Business Meeting (0.5 CPE)
LaSalle Room
Legislative Update and Election of Officers.
Conference Concludes

*Refer to description of Concurrent Session Schedule

Unless otherwise noted, all sessions are at the Gateway Center Collinsville

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Third Millennium Associates, Inc.

“It isn't the high price of stars that is expensive, it's the high price of mediocrity.

—*Bill Veeck, Owner, Cleveland Indians, St. Louis Browns, Chicago White Sox*

Attention speakers:

The Speaker Ready Room is available in Illini A from 8 am to 4 pm on Monday, and from 8 to 10 am on Tuesday.

Future IGFOA Annual Conferences

2003: September 26-30, Peoria

2004: September 24-28, Moline

Locations and dates are subject to change. Check www.igfoa.org for details.

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Session Speakers, cont'd.

John H. Peterson is a Principal of Legg Mason Wood Walker. His experience includes contract revenue, utility, and general corporate municipal, as well as non-profit corporation finance. He has structured short-duration notes and bonds, put bonds, senior/subordinate debt, long-term fixed-rate debt, and certificate lease transactions.

Richard L. Potter is an Executive Consultant with Becker, Burke Associates with over 27 years experience in the consulting field. He is co-author of "Implementing Sponsor Control in Real Estate Co-Investment" which was published in *Pension World*.

Steven C. Reid is a Senior Consultant with Houston Associates. He believes that the vision of an organization is achieved through the continuous collection of information and the development of the individuals within to maximize their potential.

David A. Richardson, CPA is Finance Director and Treasurer of the Village of Streamwood. He previously served as a manager for the CPA firm of Karrison and Byrne, specializing in providing audit services to local governments. He became a Certified Public Finance Officer in 2001.

Ralph M. Segall CFA, CIC is a Co-Founder and Managing Director of Segall Bryant & Hamill as well as Senior Portfolio Manager and Chairman of the Segall Bryant & Hamill Investment Policy Committee. He organized The Lower Wacker Fund, LLC, an alternative investment fund in 1998.

Ted Steinbrecher is the co-founder and President of Group 1 Resources, Inc. Group 1 is an IT consulting, implementation and software company specializing in the municipal and county government market. He previously managed the government consulting practices of Bricker & Associates, Inc.

Gateway Center Floor Plan



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