



NORTH CAROLINA
Government Finance Officers Association

NCGFOA Summer Conference Agenda
July 21 – 23, 2024
Wilmington, NC

Sunday | July 21, 2024

- 10:00 am – 6:00 pm Exhibitors Check in for setup | Exhibit Hall opens to Members on Monday morning at 7:30 am | All Sponsors are welcome to attend Sunday Welcome Reception
- 3:30 pm – 6:00 pm Registration Open | Information Desk
- 5:00 pm – 7:00 pm Welcome to Wilmington Reception | River Concourse

Monday | July 22, 2024

- 7:30 am – 4:30 pm Registration Open | Information Desk
- 7:30 am – 6:00 pm Exhibit Hall Open
- 7:30 am – 8:30 am [NETWORKING CONTINENTAL BREAKFAST | Exhibit Hall](#)
- 8:30 am – 8:45 am Welcoming Announcements | Grand Ballroom
- 8:45 am – 9:45 am SESSION 1 | AI in Finance | Randy Cress, Assist. County Manager, Information Technology, Rowan County | Grand Ballroom
- 9:45 am – 10:00 am [NETWORKING BREAK | Exhibit Hall](#)
- 10:00 am – 11:00 am SESSION 2 | Internal Controls/Fraud | TD Hill & Diana Hardy, Managing Director of Audit Operations & COO, RH CPAs | Grand Ballroom
- 11:00 am – 12:00 pm SESSION 3 | US and North Carolina Economic Outlook | Nicole Cervi, Economist, Wells Fargo Corporate & Investment Bank | Grand Ballroom
- 12:00 pm – 12:45 pm NCGFOA Business Meeting | Grand Ballroom
- 12:45 pm – 2:00 pm [LUNCH | Exhibit Hall](#)
- 2:00 pm – 3:00 pm BREAKOUT SESSION 4 – (1) Sales Tax Forecasting | Keith Lane, Budget & Management Services Director, Durham County, Jackie McKoy, CFO & Veronica Pace, Distribution Unit Manager, NC Dept. of Revenue, David Boyd, CFO Mecklenburg County | Grand Ballroom

BREAKOUT SESSION 4 – (2) Utility Infrastructure Finance | Shadi Eskaf, NCDEQ DWI | Jr. Ballroom 106 & 107

3:00 pm – 3:30 pm

[NETWORKING DESSERT BREAK | Exhibit Hall](#)

3:30 pm – 4:30 pm

SESSION 5 | LGC Updates | Debbie Tomasko, Director, Jennifer Wimmer, Director, State & Local Govt Finance Division, Kendra Boyle, Director Fiscal Management, NC Dept. of State Treasurer | Grand Ballroom

4:30 pm – 6:00 pm

Cocktail Reception | Exhibit Hall

6:00 pm – 7:15 pm

Optional | Boat Cruise | Trip 1 | 5:30 pm Board, Cruise 6:00 pm – 7:15 pm

8:00 pm – 9:15 pm

Optional | Boat Cruise | Trip 2 | 7:30 pm Board, Cruise 8:00 pm – 9:15 pm

NOTE: For those that registered to attend one of the boat cruises, loading will be on the Cape Fear River. The boat will be located at the City Dock directly out front of the Main Entrance of the Wilmington Convention Center.

Tuesday | July 23, 2024

7:30 am – 3:30 pm

Registration Open

7:30 am – 2:30 pm

Exhibit Hall Open

7:30 am – 8:30 am

[NETWORKING CONTINENTAL BREAKFAST | Exhibit Hall](#)

8:30 am – 10:30 am

SESSION 6 | Breaking the Mold: Unleashing the Power of Finance | KEYNOTE Jennifer Elder, CPA, CMA, CIA, CFF, CGMA, The Sustainable CFO | Grand Ballroom

10:30 am – 10:45 am

[NETWORKING BREAK | Exhibit Hall](#)

10:45 am – 11:45 am

BREAKOUT SESSION 7 - (1) Long-term Planning & Modeling for Utilities | Chad Cowan, Senior Manager & Ford Moriarty, Senior Consultant | Raftelis | Jr. Ballroom 107 & 108

BREAKOUT SESSION 7 - (2) Discussion of Local Government Investment Pools | Karen Magness, PFM Asset Management LLC, Dan Klus, Senior Director Investments Services & Justin Wycoff, Director Investment Services, NC Class, Ash Mehta, Director Investment Services, Public Trust Advisors, Gary Porter, Vice President, NC Capital Management Trust | Grand Ballroom

BREAKOUT SESSION 7 - (3) Intro to LGF (part 1) | Kara Millonzi, Professor & Rebecca Badgett, Teaching Assistant Professor of Public Law & Govt. UNC SOG | Jr. Ballroom 106

11:45 am – 1:00 pm

[LUNCH | Exhibit Hall](#)

1:00 pm – 2:00 pm

BREAKOUT SESSION 8 - (1) Single Audits | Scott Anderson, Director & Richard Hart, Sr. Manager, Cherry Bekaert LLP | Grand Ballroom

BREAKOUT SESSION 8 – (2) Banking Services RFPs | Mindy Taylor, Treasurer, City of Durham, Richard G. Long, Jr., Manager, Tim Pinon, Banking Consultant, Valley View Consulting, LLC, and Kevin Harewood, Executive Director, Government Banking, JP Morgan | Jr. Ballroom 107 & 108

BREAKOUT SESSION 8 - (3) Intro to LGF (part 2) | Kara Millonzi, Professor & Rebecca Badgett, Teaching Assistant Professor of Public Law & Govt. UNC SOG | Jr. Ballroom 106.

2:00 pm – 2:30 pm

[NETWORKING DESSERT BREAK | Exhibit Hall | Exhibit Hall closes after this break](#)

2:30 pm – 3:30 pm

SESSION 9 | NCLM & NCACC Legislative Update | Chris Nida, NCLM & Denise Canada, NCACC | Grand Ballroom

5:30 pm – 7:00 pm

Cocktail Reception | Marina Concourse

7:00 pm – 11:00 pm

Buffet Dinner & Party | Grand Ballroom

ENTERTAINMENT | LOVE TRIBE

DRAFT