



## **January 2020 Quarterly Training (5 CPEs)**

**Date:** January 9, 2020

**Time:** 8:30 a.m. – 3:00 p.m.

**Location:** Fountain Hills Community Center

**Cost:** \$30/\$45 non-members (Includes 5 CPE credits, coffee in the morning and lunch)

**Parking:** Included

**8:30 a.m.**

**Registration Opens**

**9:00 - 9:50 a.m.**

**Sales Tax Forecasting – Does One Size Fit All?**

Sales tax forecasting is an essential aspect of a government's operations. In this panel discussion, you will learn more about the data sources, tools and unique challenges that municipalities of various sizes must consider when forecasting sales tax revenues.

**Speakers:**

Jeffrey J. Barton, Budget and Research Director, Phoenix  
Lisette Camacho, Glendale  
Scott McCarty, CPA, Finance Director, Queen Creek  
Dan Wang, Budget Analyst III, Phoenix

**10:00 - 10:50 a.m.**

**Arizona Revenues, Old and Potentially New Ones?**

This session will discuss the standard revenues available to cities and towns in Arizona, their legal restrictions as well as whether they are considered "one-time versus ongoing." We also will be discussing some "out-of-the-box" thinking about other revenues that are being considered by Arizona cities and towns, that may or may not hold up to challenges. This will be an interactive session where audience participation is encouraged!

**Speakers:**

Kirsten Lennon, Financial Services Director, Cottonwood  
Pat Walker, Municipal Finance Consultant, Pat Walker Consulting, LLC

**11:00 - 11:50 a.m.**

**The Basics in Financial Forecasting – Short or Long**

This session will cover the “textbook” types of long- and short-term forecasting but will also present how to prepare the best and most accurate forecasts. The speakers will drill down into the “do’s” and “don’ts” of revenue and expenditure forecasting. The speakers will also be presenting examples of financial forecasting they have done for various communities in Arizona.

Speakers: Lindsey Duncan, Finance and Budget Director, Avondale  
Pat Walker, Municipal Finance Consultant, Pat Walker Consulting, LLC

**12:00 p.m.**

**Lunch**

**1:00 - 1:50 p.m.**

**Tax Changes**

League of Arizona Cities and Towns Tax Policy Analyst Lee Grafstrom will walk attendees through recent changes that have occurred regarding taxes in the state of Arizona.

Speaker: Lee Grafstrom, Tax Policy Analyst, League of Arizona Cities and Towns

**2:00 - 2:50 p.m.**

**How to Get the Most out of Your Sales Tax Auditing Contract**

Is your sales tax auditing contract working for you? Discover how to get the most of your contract, learn the important questions to ask, and feel confident knowing that your organization is maneuvering the auditing process effectively.

Speakers: Lee Grafstrom, Tax Policy Analyst, League of Arizona Cities and Towns

**3:00 p.m.**

**Training Concludes**

**CPE Forms will be available at the registration desk at the conclusion of the full training. Be sure to leave a copy with GFOAz Staff and take a copy for your own records!**