


JANUARY 2021 TRAINING



**James Shankland, Audit Manager,
HeinfeldMeech**

James Shankland is an audit manager with HeinfeldMeech, and has 10 years of experience in audit and assurance services, working with municipalities, school districts, and non-profit organizations. He is a recipient of the Advanced Single Audit Certificate from the AICPA, and has extensive experience testing federal programs under Single Audit requirements.



**Ash Mehta, Vice President of Investment
Advisory Services, Public Trust Advisors**

Ash is a Vice President of Investment Advisory Services for Public Trust where he focuses on offering investment advisory solutions to clients in Arizona as well as managing current client relationships and expanding the awareness of Public Trust products and services to current and potential clients. Prior to joining Public Trust, he most recently held the role of Capital Markets Executive for a private equity firm where he raised awareness of the fund and the opportunities to invest in non-correlated investment asset classes.



Chris DeBow, Managing Director, Public Trust Advisors

Chris is a Managing Director of Investment Advisory Services for Public Trust and has almost twenty years of investment experience assisting public sector clients nationwide with their investment management needs. He has a broad knowledge of state statutes governing public funds investment and regularly works with clients to create flexible investment strategies for a variety of funds including operating, construction, and debt service funds among others. He also specializes in assisting underlying issuers who implement conduit issue financing.



Annette Gaston, Senior Managing Consultant, PFM

Annette Gaston joined PFM in 2018 as a senior managing consultant in the Chandler, AZ office. Annette manages client relationships for public agency clients throughout the Western United States. Her responsibilities include investment advisory services, investment policy evaluation, economic research, portfolio analysis, and cash flow modeling. Prior to joining PFM, Annette was a sales representative for Johnson & Johnson where she worked with key account clients in the Southern California market. Before joining Johnson & Johnson, Annette spent five years as a Consulting Group analyst managing private wealth and institutional client portfolios, in Arizona and Southern California. She brings a demonstrated history of working in the financial services industry, and multiple years of experience. She is an Arizona native and a graduate of Grand Canyon University where she pursued a degree in Finance and Economics.



Luke Schneider, Director, PFM

Luke Schneider joined PFM's asset management business as a director in 2015 and manages engagements in the Southwestern and Northwestern U.S. Luke has extensive experience managing and advising on fixed-income portfolios for public entities, higher education institutions, and special districts.

Prior to joining PFM, Luke was a managing director and senior portfolio manager at Government Portfolio Advisors (GPA) where he spent two years managing institutional investment portfolios.

Before joining GPA, Luke spent four years with Davidson Fixed Income Management as a portfolio analyst and sales and trading representative, and before that two years as a research analyst for RMH Investment Management, LLC.

Luke is a member of the CFA Institute and a board member of the CFA Society of Tucson.





Jonathan Ngah, Principal, Synergy

Jonathan Ngah has served as the Principal of Synergy since January 2011. Mr. Ngah is a dynamic leader responsible for cultivating and directing the firm's culture and strategic vision and managing all aspects of the business, including internal operations, client services, and business development. Mr. Ngah is considered a GRC and Internal Audit thought leader and a trusted and loyal partner to his clients. He manages the firm on unwavering principles of honesty, integrity, and determination. Synergy has experienced growth, adding critical Financial Management and GRC engagements within DoD, and other Federal Government Civilian Agencies. Before joining Synergy, Mr. Ngah was a Senior Manager at Grant Thornton LLP in the firm's Internal Audit Advisory practice. He also served as the Chief Control Officer at the Bank of New York Mellon.

Mr. Ngah has 20+ years of industry and advisory, risk management, internal audit, and operations experience supporting the public and private sector organizations. Under his leadership, Synergy has a successful track record with past accomplishments performing financial management reviews, supporting audit readiness and remediation efforts, and conducting internal control, risk management, business process improvement, and accounting and assurance services.

Mr. Ngah holds a Bachelor's in Economics and a master's in business administration from the University of Wisconsin. He also completed the Business Strategy and Financial Performance

	<p>program at INSEAD. Mr. Ngah is a Certified Internal Auditor (CIA), Certified Information Systems Auditor (CISA), Certified Fraud Examiner (CFE), and Certified Government Financial Manager (CGFM).</p>
	<p>Paulina Woo, Managing Director, PFM</p> <p>Paulina joined PFM in 2007 and manages client relationships for public agencies located throughout the western United States. Her responsibilities include: investment advisory and consulting services, cash flow modeling, portfolio structuring, economic research, treasury management consulting and investment policy evaluations. She works with a diverse number of municipalities, institutions of higher education and non-profit organizations.</p> <p>Paulina is a frequent speaker at municipal conferences and seminars for clients and board members; covering such subjects as bond proceeds investment, building an investment program, permitted investments, development of investment policies and internal controls, and managing risk in public investment. She is a member of the Government Finance Officers Association (GFOA) and is an Advisor member of the GFOA Committee On Treasury and Investment Management (T IM). She is also an active participant in several additional public finance organizations, including the National Association of Counties (NACo), Government Finance Officers Association of Arizona (GFOAz), New Mexico Government Finance Officers Association (NMGFOA), the Arizona County Treasurer's Association (ACTA), and Colorado River Finance Officers Association (CRFOA). She also participates in Women in Public Finance, National Association of Hispanic County Officials, and Asian Americans in Public Finance.</p>
	<p>Ron Curtis, Executive VP of Lending, American Southwest Credit Union</p> <p>Ron currently serves as Executive Vice President with American Southwest Credit and has enjoyed a more than 40 year career in banking. Ron received his B.S. in Business Administration from the University of Arizona and MBA from the University of Phoenix. He has been a board member with the Arizona Regional Economic Development Foundation for over ten years, serves on the Arizona Governors' Council for Workforce Development, and is the Chairman of the Board of Arizona@Work for Southeastern Arizona.</p>



Lori Collins, Deputy Director, City of Mesa Economic Development

Lori Collins joined the City of Mesa Economic Development team in September 2019 as deputy director. Lori's focus is on development priorities related to Phoenix-Mesa Gateway Airport, southeast Mesa and other economic development projects of strategic importance to the City.

Previously, Lori worked for the City of Phoenix as the deputy director of economic development with responsibility for business attraction, focusing specifically on developing and implementing strategies to encourage investment and drive job growth. She assisted numerous noteworthy companies to locate in Phoenix including Stitch Fix, Farmers Insurance, Central Admixture Pharmacy Services (CAPS), and Nikola Motor Company.

Lori also worked at the City of Chandler as an economic development specialist and airport administrator for the Chandler Municipal Airport. While there, she led the efforts to expand existing businesses, attract new opportunities, and manage a team of professionals who plan, operate, and safely maintain one of the nation's busiest general aviation airports.

An Arizona native, Lori began her economic development career in Mesa in 2001 and gained a wide breadth of experience in the Greater Phoenix area by serving in various roles including marketing and communication manager with the Greater Phoenix Economic Council and as marketing director for the Phoenix and Las Vegas office of a major commercial real estate firm.

Lori is a National League of Cities Equitable Economic Development Fellow and serves on the Executive Board of Directors for the Arizona Association for Economic Development (AAED). Recently, Lori was recognized as one of the "People to Know in 2020" by AZRE Magazine.



Carrie Kelly, Executive Director, AAED

Carrie has been working with nonprofit and government entities for over 15 years. She came to the Arizona Association for Economic Development from Downtown Santa Barbara where she served as Executive Director. Prior to that, she served as Executive Director of the Mohave Community College Foundation in Kingman, Arizona. Originally from Indiana, Carrie worked as Local Government Services Director at McGaughey & Sosbe Law Offices for 11 years and as a nonprofit consultant in Indiana, working on fundraising, strategic planning, and rural community development.

She holds a B.A. in Art History, Graduate Certificate in Nonprofit Management, and M.P.A., all from Indiana University.



Mignonne D. Hollis, Executive Director, Arizona Regional Economic Development Foundation

Mignonne graduated from Tombstone Union High School, attended the University of Arizona, and went on to earn her MBA from the University of Phoenix. In her effort to support economic development in Arizona, Mignonne co-writes a weekly newspaper advice column for business owners, serves on Canyon Vista Medical Center board of trustees, Chairs the public policy committee of the International Economic Development Council and serves as the President of the Arizona Association for Economic Development. She has served on the Arizona Commerce Authority Board. In 2014, she was named economic developer of the year; and in 2017, her organization was named small organization of the year. Most recently appointed to the National Small Business Association Advisory Board, International Economic Development Council Board, as well as the International Boundary and Water Commission. Mignonne is the founder of Aerospace Arizona Association and through this association has formed the UAS Center for Innovation at the Benson Airport. Mignonne is dedicated to making an economic impact not only in rural Arizona, but throughout the entire state.