

AGENDA | THURSDAY, MAY 14 | 9:00 AM - 3:00 PM | 5 CPEs

8:00 AM | Registration

9:00 - 9:50 AM | Arizona Retirement Update: ASRS, PSPRS, SECURE 2.0, and Employer Strategy | *1 CPE*

ASRS and PSPRS continue to shape some of the most important financial and administrative decisions facing Arizona public employers. In this session, Paul Matson, Executive Director of ASRS, will speak about ASRS programs, helpful statistics, customer service, fiscal status, and employer considerations, and Clarke Partridge, Interim Assistant Administrator of PSPRS, will provide an update on PSPRS issues and the implications for Arizona local governments. Their presentations will give attendees a timely overview of the two retirement systems that most directly affect public employers across the state.

The session will also address key compliance developments affecting employer-sponsored 401(a) and 457(b) plans, including important SECURE 2.0 changes such as mandatory Roth catch-up requirements for certain higher-earning employees and the new age 60–63 super catch-up contribution tier. Additional discussion will cover Arizona's China divestment requirements and related administrative considerations for plan sponsors. Finally, Charlie Francis and Carter Kimberly of PARS will discuss how Section 115 trusts can help employers manage pension contribution volatility, support budget stability, and strengthen long-term financial resilience.

Speakers:

Paul Matson, *Executive Director, ASRS*
Clark Partridge, *Interim Assistant Administrator, PSPRS*
Charlie Francis, *Senior Consultant, PARS*
Carter Kimberly, *Senior Consultant, PARS*

10:00 - 10:50 AM | State Treasurer Presentation| *1 CPE*

The Arizona State Treasurers office will be presenting General information on what is happening at the State Treasurers office and information on the Local Government Investment Pool.

Speaker:

Jake Richardson, *LGIP Portfolio Manager, Office of the State Treasurer of Arizona*



11:00 - 11:50 AM | OBBBA No Tax on Overtime: Key Employer Considerations and Next Steps | *1 CPE*

The One Big Beautiful Bill Act (OBBBA) went into effect in 2025, creating mandatory, retroactive tracking and reporting requirements that have the potential to reshape your entire payroll and employment ecosystem. This session moves beyond high-level regulatory overviews of the legislation to give you insights into the real operational impacts and W-2 reporting considerations you'll need to understand to ensure compliance, address employee tax filing needs, and prevent painful year-end adjustments.

Speaker:

Leah Davis, *Finance Manager, Scottsdale*

12:00 - 12:50 PM | Lunch

1:00 - 1:50 PM | Disaster Preparedness | *1 CPE*

In an era of increasing natural disasters, public health emergencies, and economic disruptions, government finance officers play a critical role in ensuring community resilience. This session explores dimensions of disaster preparedness, equipping participants with practical strategies to plan, respond, and recover effectively. The session will also highlight best practices in interdepartmental coordination to support rapid and transparent financial decision-making under pressure. Through expert insights, participants will gain a deeper understanding of how proactive planning can mitigate risk, accelerate recovery, and safeguard public resources.

Speakers:

Jacob Johnson, *Emergency Manager, Scottsdale*
Whitney Pitt, *Business Services Director, Scottsdale*

2:00 - 2:50 PM | Public Assistance: Best Practices for the Grants & Finance Team | *1 CPE*

This presentation will walk the audience through a high-level summary of the Public Assistance program, the requirements of the State and Local governments to manage PA documentation effectively, and end with actionable procedures to put into place for successful program management.

Speaker:

Ian M. Keogh, *Public Assistance Branch Manager, AZ DEMA*

2:50 PM | Concludes