



**20  
23**

**INNOVATION  
THE WAY FORWARD**



Canadian Association of Government Finance Officers

**CONNECT WITH GOVERNMENT FINANCE OFFICERS  
FROM ALL ACROSS CANADA**

NATIONAL CONFERENCE  
**OCT 29 - NOV 1**  
**HYBRID**  
FACE-TO-FACE & ONLINE



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OFFICE@CAGFO.CA

DELTA HOTELS by MARRIOTT  
Ottawa City Centre, 101 Lyon St., ON



**WWW.CAGFO.CA**

PROGRAM  
[www.cagfo.vairs.com](http://www.cagfo.vairs.com)



# NATIONAL CONFERENCE

Version 2023-10-26





**Mark Sutcliffe**  
Mayor | Maire

**Office of the Mayor  
City of Ottawa**

110 Laurier Avenue West  
Ottawa, Ontario K1P 1J1  
Tel.: 613-580-2496  
Fax: 613-580-2509  
Email: [Mark.Sutcliffe@ottawa.ca](mailto:Mark.Sutcliffe@ottawa.ca)

**Bureau du maire  
Ville d'Ottawa**

110, avenue Laurier Ouest  
Ottawa (Ontario) K1P 1J1  
Tél. : 613-580-2496  
Télééc. : 613-580-2509  
Courriel : [Mark.Sutcliffe@ottawa.ca](mailto:Mark.Sutcliffe@ottawa.ca)

On behalf of Members of Ottawa City Council, it is my distinct pleasure to extend a warm welcome to all those participating in the **Canadian Association of Government Finance Officers (CAGFO) Annual Conference**, taking place at the Delta Marriott City Centre, on unceded Anishinabe Algonquin territory, from October 30<sup>th</sup> to November 1<sup>st</sup> 2023.

This national conference and AGM serve as premier forums for CAGFO members and financial sector stakeholders to convene under the theme *Innovation – The Way Forward*. Delegates will have the opportunity to discuss a diversity of important topics, including property tax trends, cloud-based best practices, and asset management, while also gaining greater industry insights through plenary sessions, keynote and other speakers, and a trade show.

As Head of Council, I want to acknowledge CAGFO, the guest speakers, sponsors, and exhibitors for dedicating efforts, expertise, services and resources to the successful organization of this inaugural hybrid conference.

Allow me to offer my best wishes to the participants for a productive and rewarding meeting, and to the visitors for an enjoyable stay in Ottawa.

Sincerely,

Au nom des membres du Conseil municipal d'Ottawa, j'ai l'immense plaisir de souhaiter chaleureusement la bienvenue à toutes les personnes participant à la **conférence annuelle de la Canadian Association of Government Finance Officers (CAGFO)**, qui aura lieu à l'hôtel Delta Marriott du centre-ville, sur un territoire non cédé de la Nation Anishinabe Algonquine, du 30 octobre au 1<sup>er</sup> novembre 2023.

Cette conférence nationale et cette assemblée générale annuelle constituent des cadres de premier plan aux membres de la CAGFO et aux intervenants du secteur financier qui se réuniront sous le thème *Innovation – La voie à suivre*. Les délégués auront l'occasion de discuter de divers sujets importants, notamment les tendances en matière d'impôts fonciers, les meilleures pratiques infonuagiques et la gestion des actifs, tout en enrichissant leurs connaissances du secteur grâce aux séances plénières, aux conférenciers d'honneur et autres, et au salon professionnel.

En tant que chef du Conseil, je tiens à remercier la CAGFO, les conférenciers invités, les commanditaires et les exposants pour les efforts, le savoir-faire, les services et les ressources qu'ils ont déployés afin d'assurer la réussite de cette toute première conférence hybride.

Permettez-moi de souhaiter aux participants une rencontre fructueuse et enrichissante et aux visiteurs un séjour agréable à Ottawa.

Cordialement,

Mark Sutcliffe, Mayor/Maire



## WELCOME TO OTTAWA!

On behalf of Ottawa Tourism, we extend to you a warm welcome to our beautiful city. Ottawa is incredibly proud to host the **CAGFO Annual Conference 2023**.

Located on the unceded territory of the Algonquin Anishinaabe nation, Ottawa offers a dynamic cultural milieu that embraces the Indigenous heritage of this land. As the capital of a bilingual nation bordering the province of Québec, you'll hear both English and French (and a multitude of other languages) on our streets. The city features a thriving cultural scene, a wealth of historic landmarks, wide-open green spaces and delivers a truly unique Canadian experience. Our national museums devoted to science, technology, aerospace, and more, offer creative and state-of-the-art exhibitions, as well as modern convention venues, offering a unique and inspiring meeting experience to its delegates. Add all of that to its clean, green, and natural setting, and you've got a capital that attracts millions of visitors every year.

When your business is done, we encourage you to explore the many attractions of the area. A pedestrian-friendly downtown core that is home to many remarkable hotels allows for delegates to attend an event and to then take in the city's many sights with ease. From beautiful museums to outdoor adventure in any season, to award-winning restaurants and high-end shopping, you can be sure that there is plenty for everyone to see and do.

To find out what's on while you're here visit [www.ottawatourism.ca](http://www.ottawatourism.ca) and be sure to share your experiences with us on social media using the hashtag **#MyOttawa**. Enjoy your visit to Ottawa and we sincerely hope we have the pleasure of welcoming you back soon!

## BIENVENUE À OTTAWA!

Au nom de Tourisme Ottawa, nous tenons à vous souhaiter la bienvenue dans notre belle ville. Ottawa est très fière d'accueillir la **conférence annuelle de la CAGFO 2023**.

Située sur le territoire non cédé de la nation algonquienne Anishinaabe, Ottawa offre un milieu culturel dynamique qui embrasse l'héritage autochtone de cette terre. En tant que capitale d'une nation bilingue limitrophe de la province de Québec, vous entendrez l'anglais et le français (et une multitude d'autres langues) dans nos rues. La ville offre une scène culturelle florissante, une multitude de monuments historiques, de vastes espaces verts et une expérience canadienne vraiment unique. Nos musées nationaux consacrés à la science, à la technologie, à l'aérospatiale, etc., proposent des expositions créatives et de pointe, ainsi que des salles de congrès modernes, qui offrent à leurs délégués une expérience unique et inspirante. Ajoutez à cela un cadre propre, vert et naturel, et vous obtenez une capitale qui attire des millions de visiteurs chaque année.

Une fois votre travail terminé, nous vous encourageons à explorer les attractions de la région. Un centre-ville piétonnier qui abrite de nombreux hôtels remarquables permet aux délégués d'assister à un événement et de visiter ensuite les nombreux sites touristiques de la ville en toute simplicité. Des musées magnifiques aux aventures en plein air en toute saison, en passant par les restaurants primés et les boutiques haut de gamme, vous pouvez être sûr qu'il y a beaucoup de choses à voir et à faire pour tout le monde.

Pour savoir ce qui se passe pendant votre séjour, visitez le site [www.ottawatourism.ca](http://www.ottawatourism.ca) et n'oubliez pas de partager vos expériences avec nous sur les médias sociaux en utilisant l'hashtag **#MyOttawa**. Nous vous souhaitons un excellent séjour à Ottawa et espérons vous accueillir de nouveau très bientôt!

**Michael Crockatt**

President & CEO | Président-directeur général

150 Elgin Street/ rue Elgin  
Ottawa, Ontario, Canada K2P 1L4  
+1 833 864 7839  
[ottawatourism.ca](http://ottawatourism.ca)  
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Canadian Association of Government Finance Officers  
2023 National Conference Oct 29 - Nov 1



**Lorrie Schmalenberg,**  
**CAGFO President**

***Innovation – the way forward!*** That is our 2023 conference theme. Change is the new normal. As professionals, we don't want just change, we want progress! We want to find better, newer, more efficient and effective ways to serve the public, and we have to find ways to be cost effective. The answer is innovation.

Welcome to this year's conference where you'll find topics of innovation, as well as our economic and public sector accounting updates, diverse educational sessions, networking opportunities and more.

I'm looking forward to being in person in beautiful Ottawa, but whether in person or virtually, I hope to "see" you there!

## OUR SPONSORS



Conference Sponsors



Canadian Association of Government Finance Officers

SILVER



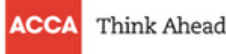
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Canadian Association of Government Finance Officers  
2023 National Conference Oct 29 - Nov 1



**Richard McCoy,**  
**Executive Director**  
**CAGFO**

Welcome Members to the 2023 CAGFO Annual Conference. We are delighted that you are able to attend this year and we hope that you will thoroughly enjoy the programming ahead. We are confident that the continuing professional development offered will support and enhance your current and future careers. We are now offering a hybrid conference giving you the opportunity to network and visit together in-person and virtually. We also hope that you will utilize some of the avenues to interact with us October 29 to November 1, inclusive. As well, we invite you to connect with our sponsors whose financial contribution supports the delivery of this national conference. Our select sponsors and exhibitors all have products and services that will be of interest to government finance officers and teams. Your feedback is important to us. We ask that you complete the post-conference survey that will be sent to you after closing on November 1. Remember this is your conference. Participate and enjoy!  
Richard McCoy, CAGFO Executive Director

# EXHIBITORS



In-person  
Booth

8:30am-5pm (EST) Monday & Tuesday In-person (Ballroom B/C)

Virtual Booths Online at [www.cagfo.vfairs.com](http://www.cagfo.vfairs.com)



Virtual Booth



CAGFO

Canadian Association of Government Finance Officers

National Conference Exhibitors  
2023

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Canadian Association of Government Finance Officers

## 2023 National Conference

### This conference is all LIVE HYBRID

ALL SPEAKER SESSIONS can be viewed IN PERSON, and ONLINE VIRTUALLY, by conference registrants:

- If watching virtually: go to <https://cagfo.vfairs.com> in the Auditorium.
- If In Person: go to the designated hotel space, either Ballroom A, Ballroom B/C, Richelieu Room, Frontenac Room, or Joliet Room. (SEE PROGRAM below)

**Access conference website, create a handy schedule of your choices as of October 29, 2023, at 4:30pm (EST)** Whether you join us in person or virtually - all the speaker sessions are available to you to watch LIVE throughout the conference. And if you miss a session, for example, because you watched a different concurrent session scheduled at the same time, then know that registrants for both in person and virtual attendance get limited access to recordings (after they are edited), until the end of Nov, available to view with your same registration email address as you registered with, on the conference website. [www.cagfo.vfairs.com](http://www.cagfo.vfairs.com) **Open your Zoom account in your website browser** (Chrome ideal) **before** logging into conference site in another tab, for optimum participation options.

**Watching virtually?** Login to <https://cagfo.vfairs.com> on October 29, 2023 at the earliest, by entering the email address you registered with. That email address is the only thing you need for access. Go to the “**AUDITORIUM**”, click on the movie screen, and you can go to each day’s schedule (to the right of your empty personal schedule, and within each day’s list of sessions, click to add the sessions you want to build your schedule (on the left). Schedule your calendar for the sessions you will want to watch live on Oct 30, 31st and Nov 1st (**but still login to [www.cagfo.vfairs.com](http://www.cagfo.vfairs.com) to connect to the sessions live.** (www.Zoom.us to download free Zoom software for Mac & Windows if you don’t already have, so you can vote in the AGM, respond to polling questions, and to do very short surveys after each session.) **ACCESS CHATROOMS** via the “**LOUNGE**”. **Virtual Exhibitors** via the “**EXHIBITOR HALL**”.

We have combined LIVE video feeds so it will be seamless for the viewer.

If a speaker is presenting from the conference hotel, or if joining into the conference virtually themselves to speak, you know by the handy orange and blue icons next to each speaker’s photo.

## IN PERSON ATTENDEES

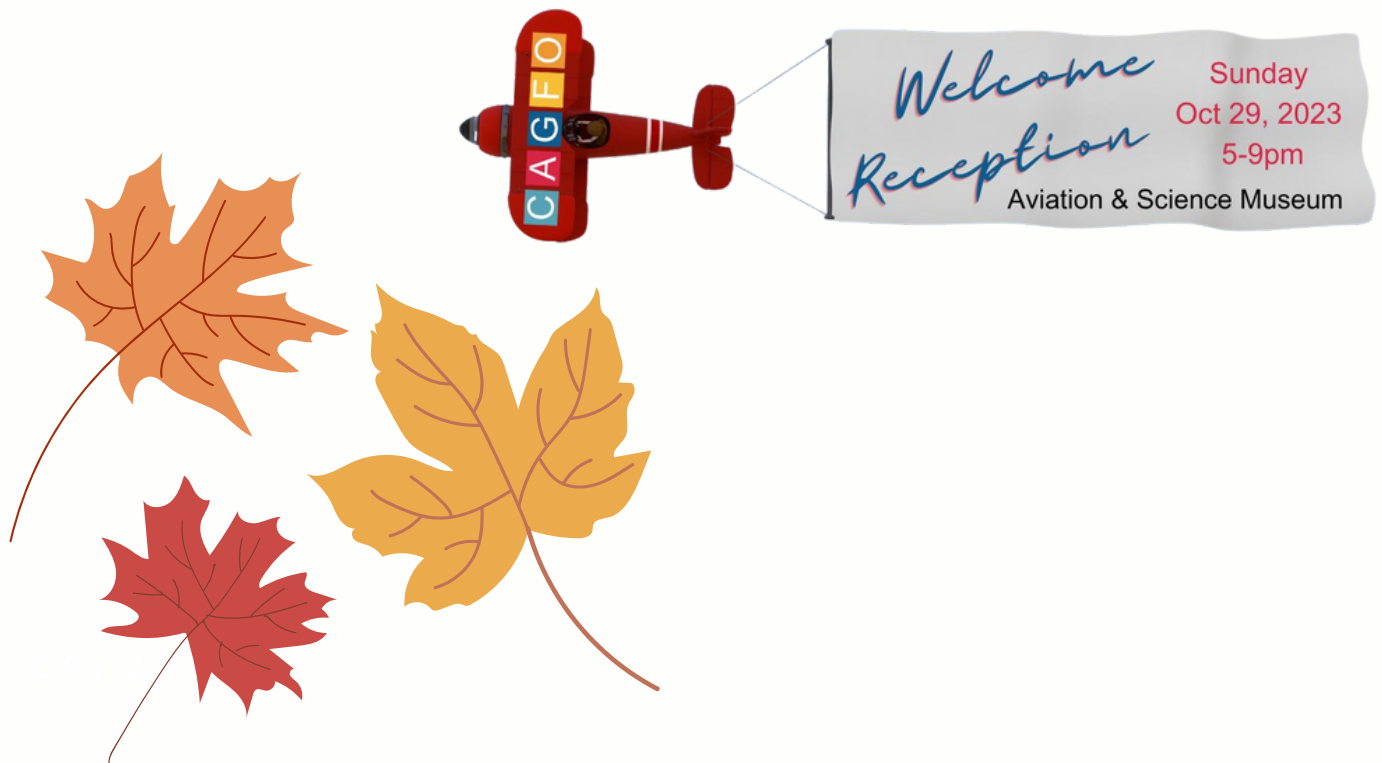


Can watch all sessions live as well, in the designated hotel spaces noted in the program, including the in person, virtual and hybrid. (Or if trying to watch online, login with the email address you signed up with, go to the [www.cagfo.vfairs.com](http://www.cagfo.vfairs.com) website and go to the Auditorium, click the movie screen. The vFairs mobile app is not for viewing sessions, it’s for realtime voting in polls and surveys, AGM voting, so in person can participate as well. It also has access to the photo booth, in person exhibitor floor plan, sponsor ads, gamification leaderboard, etc. etc.

# CAGFO 2023 ANNUAL NATIONAL CONFERENCE



## SCHEDULE OF EVENTS & SPEAKER SESSIONS, BIOS, AND ABOUT OUR SPONSORS AND EXHIBITORS



### **SUNDAY, OCTOBER 29TH, 2023**

**Prior to 5:00 PM (EST) Check-in to hotel**

**5:00 PM to 9:00 PM** Shuttle busses provided (continual pick-up and drop off every 30 minutes) round-trips from conference hotel, Delta Marriott, City Centre, 101 Lyon St. to Welcome Reception.

**5:30 PM** Welcome Reception at Aviation & Science Museum (All conference attendees also incl. sponsors, exhibitors, speakers, CAGFO Board)

**5:30 - 9:00 PM** Shuttle busses do return trips to hotel throughout the evening.

29  
OCT

# 2023 National Conference Schedule at a Glance

ALL sessions viewable online  
& in person for registrants



Canadian Association of Government Finance Officers

## DAY 1, Monday, October 30, 2023



Pacific	Atlantic	Mountain	Eastern				
5:30 - 6:30am	9:30 - 10:30am	6:30 - 7:30am	8:30 - 9:30am	<b>BREAKFAST (Provided) - Ballroom B/C with Exhibitors</b>			
6:30 - 7:00am	10:30 - 11:00am	7:30 - 8:00am	9:30 - 10:00am	IN PERSON - Ballroom A <b>Conference Opening - Mayor's office Wendy Stephanson, Bac Com CPA CMRP, New City Manager City of Ottawa; First Nations Land Acknowledgement Verna McDonald</b>			
7:00 - 8:00am	11:00 - 12:00pm	8:00 - 9:00am	10:00 - 11:00am	IN PERSON - Ballroom A <b>PLENARY</b> <b>Lee Jayes, Acclaimed Business Futurist / Innovation Strategist</b>			
8:00 - 8:30am	12:00 - 12:30pm	9:00 - 9:30am	11:00 - 11:30am	<b>AM BREAK (Provided)</b>			
8:30 - 9:00am	12:30 - 1:00pm	9:30 - 10:00am	11:30 - 12:00pm	IN PERSON <b>ANNUAL GENERAL MEETING - Ballroom A</b>			
9:00 - 10:00am	1:00 - 2:00pm	10:00 - 11:00am	12:00 - 1:00pm	IN PERSON - Ballroom A <b>PLENARY</b> <b>THE IMPORTANCE OF THE AUDITOR GENERAL IN OUR DEMOCRACY</b> Assistant Auditor General, Heather Miller, CPA CMA			
10:00 - 11:00am	2:00 - 3:00pm	11:00 - 12:00pm	1:00 - 2:00pm	<b>LUNCH (Provided) - Ballroom B/C with Exhibitors</b>			
11:00 - 12:00pm	3:00 - 4:00pm	12:00 - 1:00pm	2:00 - 3:00pm	<table border="1"> <tr> <td>IN PERSON - Richelieu Room <b>CONCURRENT SESSION</b> <b>IGNITE YOUR LEADERSHIP SKILLS AS A FINANCE PROFESSIONAL - Tim Duhamel, BLOOM</b></td> <td>IN PERSON - Frontenac Room <b>CONCURRENT SESSION</b> <b>PREPARING FOR ORGANIZATION CHANGE - ERP IMPLEMENTATION</b> - Greg Clark, Director of Capital Assets and Projects at the City of London</td> <td>IN PERSON - Joliet Room <b>CONCURRENT SESSION</b> <b>BEYOND CREDIT RATINGS: 5 Factors to Consider for Diversification and Risk Assessment - Yvette Wu, CEO/Co-founder Yield Exchange</b></td> </tr> </table>	IN PERSON - Richelieu Room <b>CONCURRENT SESSION</b> <b>IGNITE YOUR LEADERSHIP SKILLS AS A FINANCE PROFESSIONAL - Tim Duhamel, BLOOM</b>	IN PERSON - Frontenac Room <b>CONCURRENT SESSION</b> <b>PREPARING FOR ORGANIZATION CHANGE - ERP IMPLEMENTATION</b> - Greg Clark, Director of Capital Assets and Projects at the City of London	IN PERSON - Joliet Room <b>CONCURRENT SESSION</b> <b>BEYOND CREDIT RATINGS: 5 Factors to Consider for Diversification and Risk Assessment - Yvette Wu, CEO/Co-founder Yield Exchange</b>
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12:00 - 12:30pm	4:00 - 4:30pm	1:00 - 1:30pm	3:00 - 3:30pm	<b>PM BREAK (Provided) - Ballroom B/C with Exhibitors</b>			
12:30 - 1:30pm	4:30 - 5:30pm	1:30 - 2:30pm	3:30 - 4:30pm	<table border="1"> <tr> <td>IN PERSON - Richelieu Room <b>CONCURRENT SESSION</b> <b>FUNDAMENTALS OF MANAGING PUBLIC SECTOR RISK - Ed McCaulley, F. H. Black &amp; Company Incorporated</b></td> <td>IN PERSON - Frontenac Room <b>CONCURRENT SESSION</b> <b>EVERYTHING YOU NEED TO KNOW ABOUT ARTIFICIAL INTELLIGENCE ... BUT DIDN'T KNOW TO ASK - James Spellos, President, Meeting U</b></td> <td>IN PERSON - Joliet Room <b>CONCURRENT SESSION</b> <b>OPTIMIZING GOVERNMENT FINANCES THROUGH THE POWER OF GROUP PURCHASING - Olly Morrison, CPA &amp; Jeff Nichol, CANOE Procurement Group of Canada</b></td> </tr> </table>	IN PERSON - Richelieu Room <b>CONCURRENT SESSION</b> <b>FUNDAMENTALS OF MANAGING PUBLIC SECTOR RISK - Ed McCaulley, F. H. Black &amp; Company Incorporated</b>	IN PERSON - Frontenac Room <b>CONCURRENT SESSION</b> <b>EVERYTHING YOU NEED TO KNOW ABOUT ARTIFICIAL INTELLIGENCE ... BUT DIDN'T KNOW TO ASK - James Spellos, President, Meeting U</b>	IN PERSON - Joliet Room <b>CONCURRENT SESSION</b> <b>OPTIMIZING GOVERNMENT FINANCES THROUGH THE POWER OF GROUP PURCHASING - Olly Morrison, CPA &amp; Jeff Nichol, CANOE Procurement Group of Canada</b>
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1:30 - 2:00pm	5:30 - 6:00pm	2:30 - 3:00pm	4:30 - 5:00pm	<b>PM BREAK (Provided) - Ballroom B/C</b>			
2:00 - 3:00pm	6:00 - 7:00pm	3:00 - 4:00pm	5:00 - 6:00pm	<table border="1"> <tr> <td>IN PERSON - Richelieu Room <b>CONCURRENT SESSION</b> <b>LEADERSHIP - KNOWING OURSELVES &amp; APPRECIATING OTHERS - Earl Hoeg, MBA Head of People and Places with People First Inc. Founder of Gray Matters Connections.</b></td> <td>IN PERSON - Frontenac Room <b>CONCURRENT SESSION</b> <b>ARE YOU DIGITALLY SECURE? FIND OUT: - James Spellos, President, Meeting U</b></td> <td>IN PERSON - Joliet Room <b>CONCURRENT SESSION</b> <b>DETERMINING ASSET VALUES FOR INSURANCE AND OTHER PURPOSES IN THE PUBLIC SECTOR - Natalia Szubocsev, CAIB MBA, Director of Business Development, Appraisals International</b></td> </tr> </table>	IN PERSON - Richelieu Room <b>CONCURRENT SESSION</b> <b>LEADERSHIP - KNOWING OURSELVES &amp; APPRECIATING OTHERS - Earl Hoeg, MBA Head of People and Places with People First Inc. Founder of Gray Matters Connections.</b>	IN PERSON - Frontenac Room <b>CONCURRENT SESSION</b> <b>ARE YOU DIGITALLY SECURE? FIND OUT: - James Spellos, President, Meeting U</b>	IN PERSON - Joliet Room <b>CONCURRENT SESSION</b> <b>DETERMINING ASSET VALUES FOR INSURANCE AND OTHER PURPOSES IN THE PUBLIC SECTOR - Natalia Szubocsev, CAIB MBA, Director of Business Development, Appraisals International</b>
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				<a href="https://cagfo.vfairs.com">REGISTER</a> <a href="https://cagfo.vfairs.com">https://cagfo.vfairs.com</a>			
				<b>PROFESSIONAL DEVELOPMENT &amp; NETWORKING CONFERENCE.</b> <b>INNOVATION THE WAY FORWARD.</b> EMAIL: OFFICE@CAGFO.CA Questions? <a href="https://cagfo.ca">https://cagfo.ca</a>			





# 2023 National Conference Schedule at a Glance



Canadian Association of Government Finance Officers

## DAY 2, Tuesday, October 31, 2023



Pacific	Atlantic	Mountain	Eastern				
5:30 - 6:30am	9:30 - 10:30am	6:30 - 7:30am	8:30 - 9:30am	<b>BREAKFAST (Provided) - Ballroom B/C with Exhibitors</b>			
6:30 - 6:45am	10:30 - 10:45am	7:30 - 7:45am	9:30 - 9:45am	IN PERSON - Ballroom A <b>Shelley Stedall</b> <b>President MFOA</b>			
6:45 - 7:45am	10:45 - 11:45pm	7:45 - 8:45am	9:45 - 10:45am	IN PERSON - Ballroom A <b>PLENARY - KEYNOTE SPEAKER - Fireside Chat</b> Pamela Steer, FCPA CFA, President & CEO, CPA Canada, & Stephenie Fox, FCPA,FCA, Senior Vice-President, Standards, CPA Canada			
7:45 - 8:15am	11:45 - 12:15pm	8:45 - 9:15am	10:45 - 11:15am	<b>AM BREAK (Provided)</b> <i>Reminder, to check out the in-person exhibitors at break &amp; lunch. Last chance in-person.</i>			
8:15 - 9:15am	12:15 - 1:15pm	9:15 - 10:15am	11:15 - 12:15pm	VIRTUAL - Ballroom A - <b>PLENARY SESSION, ANNUAL PSAB UPDATE</b> - Clyde MacLellan, FCPA FCA, & Michael A. Puskaric, CPA CMA			
9:15 - 10:15am	1:15 - 2:15pm	10:15 - 11:15am	12:15 - 1:15pm	<b>LUNCH (Provided) - Ballroom B/C with Exhibitors</b>			
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11:15 - 11:45pm	3:15 - 3:45pm	12:15 - 12:45pm	2:15 - 2:45pm	<b>PM BREAK (Provided) - Ballroom B/C with Exhibitors</b>			
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# 2023 National Conference Schedule at a Glance



Canadian Association of Government Finance Officers

## DAY 2, Tuesday, October 31, 2023

SCHEDULE CONTINUED



Pacific	Atlantic	Mountain	Eastern	
2:15 - 3:15pm	6:15 - 7:15pm	3:15 - 4:15pm	5:15 - 6:15pm	IN PERSON EXHIBITORS PACK-UP (INVITED TO NETWORKING EVENT RECEPTION AND DINNER AT 6 UNTIL MIDNIGHT EST)
3:00 - 3:30pm	7:00 - 7:30pm	4:00 - 4:30pm	6:00 - 6:30pm	<b>NETWORKING EVENT - RECEPTION (FOLLOWED BY DINNER)</b> - Pinnacle Room (in person only)
3:30 - 9:00pm	7:30pm	4:30pm	6:30pm - midnight	<b>NETWORKING EVENT - DINNER &amp; Entertainment SPOOKTACULAR (Provided)</b> - Pinnacle Room (wear your conference badges)
				IN PERSON REGISTRANTS, SPONSORS, EXHIBITORS, BOARD - Delicious meal & Halloween treats included.

## DAY 3, Wednesday, Nov 1, 2023

BREAKFAST (Provided) - Ballroom B/C



Pacific	Atlantic	Mountain	Eastern	
5:30 - 6:30am	9:30 - 10:30am	6:30 - 7:30am	8:30 - 9:30am	BREAKFAST (Provided) - Ballroom B/C
6:30 - 6:45am	10:30 - 10:45am	7:30 - 7:45am	9:30 - 9:45am	VIRTUAL - Ballroom A <b>LET'S TALK ABOUT GFOA</b> Terri Velasquez, CPA, CPFO, Finance Director for the City of Aurora, Past President GFOA
6:45 - 7:45am	10:45 - 11:45pm	7:45 - 8:45am	9:45 - 10:45am	IN PERSON - Ballroom A PLENARY <b>ECONOMIC UPDATE</b> - Susan Mowbray, MA, Partner, Economics and Research, MNP
7:45 - 8:15am	11:45 - 12:15pm	8:45 - 9:15am	10:45 - 11:15am	<b>AM BREAK (Provided)</b>
8:45 - 9:15am	12:15 - 1:15pm	9:15 - 10:15am	11:15 - 12:15am	IN PERSON - Ballroom A PLENARY - KEYNOTE SPEAKER <b>ACHIEVING BALANCE: HOW TO ACHIEVE A BETTER WORK/LIFE BALANCE</b> - Mike Lewis, MBA
9:15 - 9:45am	1:15 - 1:45pm	10:15 - 10:45am	12:15 - 12:45am	<b>CLOSING REMARKS - Ballroom A</b>

Updated 2023-10-26

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# CAGFO 2023 ANNUAL NATIONAL CONFERENCE



## Note:

**Plenary sessions** are single sessions (everyone watches the same live session.)

**Concurrent sessions** are three different sessions, running at the same time slot, in different rooms. Live viewing? You choose one to watch live. The other two, you will still be able to watch them until the end of November on video on demand, via the [www.cagfo.vfairs.com](http://www.cagfo.vfairs.com) website once the live video has been edited after the conference.

FOR ALL SESSIONS, if you are watching online, YOU GO TO THE AUDITORIUM of the conference website, to either your schedule that you built, or the individual day's schedule (tab right beside it), and click on the glowing button that says LIVE. If your Zoom is already open, you will be brought into the Zoom to view, ask questions, vote, do polls, etc. If not, you will simply watch without interacting.

Also, take a virtual walk (using your arrow keys) and check-out the Virtual Lounge and Exhibitor booths - Exhibitors will list when they are available to chat live. Have fun with the photo booth. Your access to the Virtual Conference Venue is only activated starting Sunday, October 29th at 4:30pm (EST). Then you will be able to go to the Auditorium and schedule your session choices in advance if you want to. When sessions are live, a **Live button will appear or glow** that you will click on to watch.

## BREAKFAST

**BALLROOM B/C** *Monday, October 30, 8:30am-9:30am*

### *Breakfast*

*Breakfast, and check-out the in-person exhibitors (same room); & an interactive virtual Exhibitor Hall at [cagfo.vfairs.com](http://cagfo.vfairs.com) Take your photo in the virtual "Photo booth" in person on the app; virtual on website.*

## OPENING

**BALLROOM A** *Monday, October 30, 9:30am-10:00am*

### *Conference Opening*

***Conference Opening, Special Guest from the Mayor's Office - Greeting from Wendy Stephanson, New City Manger for the City of Ottawa.***

PRESENTING  
IN PERSON



**Wendy Stephanson, Bac Com CPA CMRP**

*New City Manager, City of Ottawa*

PRESENTING  
IN PERSON

**Verna McDonald** ***First Nations Land Acknowledgement, Smudging Ceremony***

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OCT

# CAGFO 2023 ANNUAL NATIONAL CONFERENCE



## KEYNOTE

**BALLROOM A** *Monday, October 30, 10:00am-11:00am*



PRESENTING  
IN PERSON

### LEE JEYES - KEYNOTE SPEAKER

*Acclaimed Business Futurist /  
Innovation Strategist  
Former Head of Innovation,  
Walmart Canada*

In our rapidly evolving business landscape, Lee Jeyes equips leaders with the tools and strategies needed to face these changes head-on and thrive.

As the most recent Head of Innovation at Walmart Canada, Lee led a team of researchers, creators, strategists and developers that continuously challenged the status quo.

Lee was the youngest store manager in both the UK and Canada for the world's largest retailer and was part of the launch of Walmart Canada's online grocery business which drove over \$500 million in business value in a two-year period.

His contributions to the industry have been recognized in publications such as the Progressive Grocer's Industry's Best and Brightest Under 40 in 2021.

Spearheading the launch and leading Walmart Canada's first innovation incubator - Blue Labs - Lee's primary role was to discover, intake and create solutions for the most complex challenges that customers and leaders are facing today.

In his spare time, you can find him in Toronto walking along the water with his Great Dane, Wall or making music in his plant-filled loft.

# CAGFO 2023 ANNUAL NATIONAL CONFERENCE



**BREAK**

**BALLROOM B/C** *Monday, October 30, 11:00am-11:30am*

**AGM**

**BALLROOM A** *Monday, October 30, 11:30am-12:00pm*

PRESENTING  
IN PERSON

**ANNUAL GENERAL MEETING**

**PLENARY**

**BALLROOM A** *Monday, October 30, 12:00am-1:00pm*



## THE IMPORTANCE OF THE AUDITOR GENERAL IN OUR DEMOCRACY

*Heather Miller, Chartered Professional Accountant, CPA, Certified Management Accountant CMA  
Assistant Auditor General*

The Office of the Auditor General of Canada (OAG) serves Parliament by providing it with objective, fact-based information and expert advice on government programs and activities, gathered through legislative audits. Parliamentarians use OAG reports to oversee government activities and hold the federal government to account for its handling of public funds. These activities cover topics such as health, culture, the environment, finance, agriculture, transportation, and scientific research, to name only a few.

This Office's work is extremely important for our democracy. Given our ever changing world, this session will outline how the OAG is adapting to meet the evolving needs of Parliamentarians and Canadians.

**LUNCH**

**BALLROOM B/C** *Monday, October 30, 1:00pm-2:00pm*

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OCT

# CAGFO 2023 ANNUAL NATIONAL CONFERENCE



## INNOVATION THE WAY FORWARD

CONCURRENT

Monday, October 30, 2:00pm-3:00pm

### RICHELIEU ROOM



PRESENTING  
IN PERSON

## IGNITE YOUR LEADERSHIP SKILLS AS A FINANCE PROFESSIONAL

*Tim Duhamel, BLOOM*

Session Overview:

- Learn about the key skills required to lead as a financial professional in municipal government
- Learn about the challenges you will face on your leadership journey
- Learn how to improve your leadership skills
- Learn how to transition from being a financial professional to municipal executive or CAO roles

**BLOOM**



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OCT

# CAGFO 2023 ANNUAL NATIONAL CONFERENCE



## INNOVATION THE WAY FORWARD

CONCURRENT

Monday, October 30, 2:00pm-3:00pm

### FRONTENAC ROOM

#### PREPARING FOR ORGANIZATIONAL CHANGE - ERP IMPLEMENTATION

Many public sector organizations struggle with legacy IT systems that lack the capabilities and integration required to manage a modern City, limiting the ability to capture and utilize valuable data to enable efficient and effective decision-making. In an effort to modernize many look for a technology solution without first properly assessing and understanding their readiness for change.

This session will focus on:

- Building a Culture of Change - the importance of preparing the people who will determine your success for the future
- Assessing the Current State - understanding where you are in relation to where you want to get
- Developing a Vision for the Future - Establishing corporate policy while meeting business needs.

PRESENTING  
IN PERSON



#### Greg Clark

Director of Capital Assets and Projects at the City of London

### JOLIET ROOM

#### BEYOND CREDIT RATINGS

Five factors to consider for diversification and risk assessment.

Portfolio diversification is critical, but choosing the right financial institution can feel like a daunting task. Many decision-makers lean towards credit ratings to help assess an FI, but that shouldn't be your sole deciding factor. In this session with Yvette Wu, CEO and Co-founder of Yield Exchange, we will explore 5 additional factors that go beyond a credit rating that will help you make better investment decisions and mitigate risk.

PRESENTING  
IN PERSON



Yield Exchange

#### Yvette Wu

CEO and Co-founder of Yield Exchange

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OCT

# CAGFO 2023 ANNUAL NATIONAL CONFERENCE



## INNOVATION THE WAY FORWARD

**BREAK**

**BALLROOM B/C** *Monday, October 30, 3:00pm-3:30pm*

**CONCURRENT**

*Monday, October 30, 3:30pm-4:30pm*

### **RICHELIEU ROOM**

#### **FUNDAMENTALS OF MANAGING PUBLIC SECTOR RISK**

*Ed McCaulley, F. H. Black & Company Incorporated*

Organizations of all types and sizes are constantly at risk. The implications of unidentified or unaligned risks in public sector organizations can be widespread, affect entire communities, and result in public scandal.

Many organizations do not have sufficient risk management processes despite the potential ramifications. Developing those processes can be a mammoth task, and public sector finance departments are already overextended. This webinar will provide an overview of Enterprise Risk Management (ERM), risk governance, and the tools that enable successful risk management without overextending the finance department.

Learn how to protect your organization by identifying and keeping tabs on crucial risks before they become a crisis.

Topics to be covered include:

- ERM introduction
- Evolution of Risk Management
- ERM definitions
- Establishing guardrails, not speed bumps
- Why adopt an ERM program?
- Risk governance
- Overview/Key elements
- Roles & Perspectives
- Three lines of defense
- Risk policy and program
- Risk framework
- Risk appetite
- Risk types and risk taxonomy
- Risk monitoring and use of Key Risk Indicators (KRIs)
- Handling incidents
- Enterprise-wide risk assessments

PRESENTING  
IN PERSON



**30  
OCT**



# CAGFO 2023 ANNUAL NATIONAL CONFERENCE



CONCURRENT

Monday, October 30, 3:30pm-4:30pm

## FRONTENAC ROOM

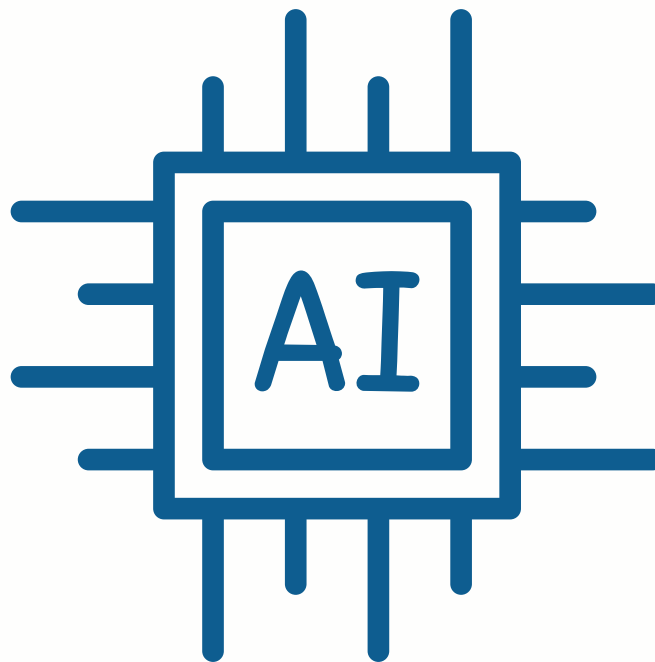
### EVERYTHING YOU NEED TO KNOW ABOUT ARTIFICIAL INTELLEGENCE ... BUT DIDN'T KNOW TO ASK

*James Spellos, President of Meeting U*

Since ChatGPT exploded in our lives in 2022, Artificial Intelligence (AI) is already having a significant impact on the tasks and requirements needed for today's education and professional work. While many are fearful that AI will replace the need for many, the reality is much more nuanced than what many are preaching, though the skill sets and tasks required are evolving. Attend this session to keep up the various tech tools that will impact your career moving forward.

After participating in this session, the learner will be able to:

- Identify 30+ AI tools that can support your work
- Review and discuss with your peers the impact of AI and other technologies on the future of the profession
- Understand how current AI technology will continue to evolve



PRESENTING  
IN PERSON



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OCT

# CAGFO 2023 ANNUAL NATIONAL CONFERENCE



**CONCURRENT**

*Monday, October 30, 3:30pm-4:30pm*

## **JOLIET ROOM**

PRESENTING  
IN PERSON



**Olly Morrison, CPA**  
*Director of Corporate Services,  
Canoe Procurement Group of  
Canada*

## **OPTIMIZING GOVERNMENT FINANCES THROUGH THE POWER OF GROUP PURCHASING**

Government agencies are constantly under pressure to deliver more services more efficiently with fewer resources. In this session, learn how group procurement can help public organizations to find cost savings, enhance sustainability initiatives, and streamline finance and procurement operations.

PRESENTING  
IN PERSON



**Jeff Nichol**  
*Director of Benefits,  
Canoe Procurement Group of  
Canada*

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procurement group of canada

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# CAGFO 2023 ANNUAL NATIONAL CONFERENCE



**BREAK**

**BALLROOM B/C** *Monday, October 30, 4:30pm-5:00pm*

**CONCURRENT**

*Monday, October 30, 5:00pm-6:00pm*

## **RICHELIEU ROOM**



PRESENTING  
IN PERSON

**Earl Hoeg, MBA**  
*Head of People and Places with People First Inc. Founder of Gray Matters Connections.*

peoplefirst

## **LEADERSHIP - KNOWING OURSELVES AND APPRECIATING OTHERS**

Are there people who you feel you really click with, where the ideas just fly? Are there others where you have difficulty connecting? How well do you know yourself? How aware are you about how you are received by team members? These are just some of the questions, and answers!, that we'll cover in this lively, fun, and interactive session to help us better understand ourselves and appreciate our differences.

We all have unique personalities and preferences, but each of us shows up in ways that we might not fully appreciate or see. Understanding our own preferences and increasing our conscious awareness of when we are using them, can help each of us connect, adapt, and work more effectively with each other.



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# CAGFO 2023 ANNUAL NATIONAL CONFERENCE



CONCURRENT

Monday, October 30, 5:00pm–6:00pm

## FRONTENAC ROOM



PRESENTING  
IN PERSON

**James Spellos,**  
*President of Meeting U*



### ARE YOU DIGITALLY SECURE? FIND OUT:

SPEAKER – James Spello

Today's high-profile hacks of major organizations and institutions have increased awareness of the issues of digital security, yet most people are compromising their personal and company's information on a regular basis, which can put their business...and themselves...at risk. Attendees at this session will better understand the digital risks and learn to separate truth from hype about how secure their presence is.

- Understand how to best keep your personal and professional digital presence from being compromised
- Identify 3 critical acronyms for your business' digital security
- Learn over 5 tools that will significantly increase your online protection

## JOLIET ROOM



PRESENTING  
IN PERSON

**Natalia Szubocsev, CAIB MBA**

*Director of Business Development, Appraisals International*



**APPRAISALS**  
INTERNATIONAL

### DETERMINING ASSET VALUES FOR INSURANCE AND OTHER PURPOSES IN THE PUBLIC SECTOR

*Are you in charge of reporting municipal asset values for insurance or other purposes?*

If yes, you know that determining property values for diverse buildings and their contents isn't an easy task. Ever-changing construction costs, market dynamics and price points, hard-to-navigate personal property (or contents) exposures.... it is hard to keep up. This session will discuss the role of appraisals in municipal risk and financial management, the possible sources of values and the importance of report up-to-date, accurate property values.

1. Gain an insight into the role of insurance appraisals in public sector risk management.
2. Look at possible sources of property values for insurance or other purposes.
3. Discuss the importance of obtaining qualified, expert opinion of value.

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OCT

FREE TIME - 6PM/REST OF EVENING

# CAGFO 2023 ANNUAL NATIONAL CONFERENCE



**BREAKFAST**

**BALLROOM B/C** Tuesday, October 31, 8:30am-9:30am

**GFOA HELLO**

**BALLROOM A** Tuesday, October 31, 9:30am-9:45am

*GFOA Greeting - Shelley Stedall, President MFOA*



PRESENTING  
IN PERSON

## GFOA GREETING

*Shelley Stedall is the Vice President of the Municipal Finance Officers Association (MFOA). See bio section for more info.*

**KEYNOTE**

**BALLROOM A** Tuesday, October 31, 9:45am-10:45am



PRESENTING  
IN PERSON

## PAMELA STEER, FCPA CFA - KEYNOTE SPEAKER

*President and CEO, CPA Canada and Board Member passionate about lasting Leadership, Transformation and Sustainability.  
Twitter @pamela\_steer  
Toronto, Ontario, Canada*



PRESENTING  
IN PERSON

## STEPHENIE FOX, FCPA FCA

*Canada's Senior Vice-President,  
Standards, CPA*

**"FIRESIDE CHAT,  
WITH PAMELA  
STEER AND  
STEPHENIE FOX"**



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OCT

# CAGFO 2023 ANNUAL NATIONAL CONFERENCE



**BREAK**

**BALLROOM B/C** *Tuesday, October 31, 10:45am-11:15am*

**PLENARY**

**BALLROOM A** *Tuesday, October 31, 11:15am-12:15pm*



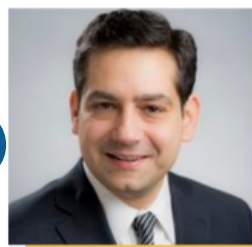
PRESENTING VIRTUALLY

**Clyde MacLellan, FCPA  
FCA**

*Chair of the Public Sector  
Accounting Board (PSAB)*

## ANNUAL PSAB UPDATE

The Annual PSAB update is one of the mainstays of our conference. The session will provide up-to-date information keeping you current with PSAB proposals including an update on: strategic plan & initiatives, projects on the technical agenda (intangibles & employee benefits) and other key initiatives (Technical Advisory Group and Indigenous Advisory Group). At the end of this session, participants should have the information they need regarding new standards and be aware of emerging issues in public sector financial reporting.



PRESENTING VIRTUALLY

**Michael A. Puskaric, CPA  
CMA**

*Director, Public Sector  
Accounting Standards for the  
Public Sector Accounting Board*



PRESENTING IN PERSON

**Lorrie  
Schmalenberg,**  
*CAGFO Board  
President*

**LUNCH**

**BALLROOM B/C** *Tuesday, October 31, 12:15pm-13:15pm*

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OCT

# CAGFO 2023 ANNUAL NATIONAL CONFERENCE



## INNOVATION THE WAY FORWARD

CONCURRENT

Tuesday, October 31, 1:15pm-2:15pm

### RICHELIEU ROOM

#### PSAB'S NEW REPORTING MODEL

In March 2023 PSAB approved its new reporting model in Section 1202, *Financial Statement Presentation*, which will be effective for fiscal years beginning on or after April 1, 2026. The Reporting Model contained in Section PS 1202:

- is consistent with PSAB's new Conceptual Framework;
- builds on the Reporting Model in Section PS 1201, *Financial Statement Presentation*; and
- provides the public with understandable information for accountability purposes.

Attend this session to obtain an overview of:

- the key principles in Section PS 1202;
- significant changes from the reporting model in Section PS 1201;
- the implications of the changes to preparers and users; and
- key consequential amendments arising from the new reporting model.

PRESENTING VIRTUALLY



**Martha Jones Denning, CPA CA**  
Associate Director  
Public Sector  
Accounting Board

PRESENTING VIRTUALLY



**Antonella Risi, CPA CA**  
Associate Director  
Public Sector  
Accounting Board

PRESENTING IN PERSON



**Lorrie Schmalenberg,**  
CAGFO Board  
President

BREAK

**BALLROOM B/C** Tuesday, October 31, 2:15pm-2:45pm

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OCT

# CAGFO 2023 ANNUAL NATIONAL CONFERENCE



## INNOVATION THE WAY FORWARD

CONCURRENT

Tuesday, October 31, 1:15pm-2:15pm

### FRONTENAC ROOM

### TOPIC: TOWN OF AURORA MODERNIZES THEIR FINANCIAL, BUDGETING AND PROCUREMENT PROCESS USING ORACLE CLOUD APPLICATIONS

PRESENTING IN PERSON



**Des Seturam**  
President &  
Delivery Executive,  
Vigilant Consulting  
Services

The Town of Aurora, a mid-sized town in the Greater Toronto Area, embarked on their journey to replace a highly customized medley of on-premises applications with a competent, state-of-the-art Cloud solution. After a rigorous RFP process evaluating several ERP and Municipal solutions, Oracle was selected as the software provider and Vigilant Consulting as the software reseller and implementer of Oracle Cloud Applications. Over the nearly one-year timeline Vigilant has implemented the ERP (General Ledger, Accounts Payable, Accounts Receivable, Cash Management, Assets, Self-Service Purchasing, Procurement Sourcing, Procurement Contracts, Purchasing, Supplier Portal), EPM (Workforce Planning, Financial Planning and Project Planning) integrating with the Municipal Solutions (Property Tax, Utility Billing, etc.)

PRESENTING IN PERSON



**Anitha Reddy**  
Vigilant Consulting  
Services

The Municipal By-laws and the guidelines that the Town needed to adhere were strictly adhered to on the solution blueprint. Vigilant worked with the Town to ensure streamlining, and standardisations were an essential piece of the overall design. Re-engineering of existing businesses process had to be rendered to where applicable with happy outcomes such as paperless approvals giving way to online ones. Data integrity was achieved through segregation of Business Units in the Receivables Module, and mirrored in the Municipal solution to enable a seamless integration between the two systems.

PRESENTING IN PERSON



**GUEST**  
**Elizabeth Adams-  
Quattrociocchi**  
**CPA CGA**  
Project Manager,  
Financial System  
Project / Deputy  
Treasurer, Town of  
Aurora

31  
OCT



# CAGFO 2023 ANNUAL NATIONAL CONFERENCE



## INNOVATION THE WAY FORWARD

CONCURRENT

Tuesday, October 31, 1:15pm-2:15pm

### JOLIET ROOM



PRESENTING  
IN PERSON

**Michael McCormack, BA CFI**  
Director, Forensics and Litigation Support, MNP, Edmonton

### PEOPLE, GOVERNANCE, AND GOVERNMENT

*Re-establishing culture and confidence in the municipal workplace.*

Social movements such as #metoo movement and #blacklivesmatter as well as the fallout from the Pandemic, have led to an increase in the incidence of workplace investigations and harassment complaints across government. Employees are increasingly using formal mechanisms to mitigate workplace transgressions which, perhaps, in the past they would have tolerated or managed themselves. The onus of Occupational Health and Safety and Federal and Provincial Human Rights regulations, good municipal governance and fear of civil lawsuits has created an atmosphere of trepidation and concern within government. Although municipal guidance and good governance procedures are standard across government, the size of the government, the relationships within it, and the history of action or inaction, has impacted government officials. The finance officer is caught between fiscal responsibility and ensuring regulations are followed. Investigations are costly; both monetarily and reputationally. Michael will discuss the post pandemic concerns facing government organizations, what can be done to mitigate issues such as a toxic culture and what to do when a transgression occurs. This session will focus on:

- Identifying the toxic workplace or the poisoned work environment.
- Identifying gaps in policies - what are the best practices.
- Managing complaints of harassment and workplace misconduct.
- Deciding should we do it ourselves or hire a professional?
- What are the surprises to be expected?
- How do we manage the cost?

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# CAGFO 2023 ANNUAL NATIONAL CONFERENCE



## INNOVATION THE WAY FORWARD

**BREAK**

**BALLROOM B/C** Tuesday, October 31, 2:15pm–2:45pm

**CONCURRENT**

Tuesday, October 31, 2:45pm–3:45pm

### **RICHELIEU ROOM**



PRESENTING  
IN PERSON

**Charles-Antoine  
St-Jean, FCPA  
FCA**  
*CHAIR, Canadian  
Sustainability  
Standards Board  
(CSSB)*

### **IPSASB/CSSB: AN OVERVIEW OF THE CURRENT AND FUTURE LANDSCAPE OF SUSTAINABILITY REPORTING STANDARDS.**

*This session will focus on both international and national perspectives.*

In this exciting session, you will get first hand details on developments in the international and Canadian landscape of sustainability reporting. With so many changes happening today and coming in the near future, this is an important time to join us for this thought provoking session. Given the recent formation of the Canadian Sustainability Standards Board, you'll get first hand updates from the Chair on what you can look forward to in the Canadian context. Additional implications for the Public sector will also be shared. We aim to give you the information you need, with practical tips on how to get started and continue your journey with the new developments.



PRESENTING  
IN PERSON

**Renée Pichard,  
CPA CA**  
*Member,  
International Public  
Sector Accounting  
Standards Board  
(IPSASB)*



PRESENTING  
IN PERSON

**Lorrie  
Schmalenberg,**  
*CAGFO Board  
President*

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OCT

# CAGFO 2023 ANNUAL NATIONAL CONFERENCE



CONCURRENT

Tuesday, October 31, 2:45pm-3:45pm

## FRONTENAC ROOM

### FINANCIAL PLANNING FORUM

*Harnessing your ERP for Revenue and Cash Collection: Lessons Learned from Implementing Enterprise Municipality Suite at the Town of Aurora*

The Town of Aurora recently implemented a new financial system, which also included implementing Enterprise Municipality Suite (EMS) for Property Tax, Utility Billing and Cash Collection. The Enterprise Municipality Suite is a user-friendly interface that manages several areas of business unique to local governments and fully integrates into your financial system of choice. This removes the need for additional systems and keeps your data together, in one repository.

Enterprise Municipality Suite integrates revenue and invoices from the Property Tax and Utility Billing modules directly into the financial system, allowing all receivables for the municipality to be managed together. In addition, implementing the integrated CashClerk module allows customer service through the Town to capture and record cash receipts for invoices and onetime payments. It also processes pre-authorized and lockbox payments as well as managing post-dated cheques and adjustments. The entries from CashClerk are automatically posted to the financial system once balanced in EMS, recording the revenue and cash in the ledger without delay.

**Join us for a discussion of lessons** that both the Town and the software company, Ravic, learned during the implementation of the Enterprise Municipality Suite (EMS) at the Town of Aurora. A brief background to the Town's project, along with a brief introduction to the EMS product will be followed by a discussion of topics related to the implementation experience.

PRESENTING  
IN PERSON



**Kristen Michalko**  
CPA CMA  
Managing  
Principal, Ravic LLC

PRESENTING  
IN PERSON



**Bret Merry, Oracle**  
Technology  
Developer  
Managing Partner

PRESENTING  
IN PERSON



**Elizabeth Adams-  
Quattrociocchi**  
CPA CGA  
Project Manager,  
Financial System  
Project / Deputy  
Treasurer, Town of  
Aurora

**ravic**

*Enterprise*  
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SUITE**

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OCT

# CAGFO 2023 ANNUAL NATIONAL CONFERENCE



## INNOVATION THE WAY FORWARD

CONCURRENT

Tuesday, October 31, 2:45pm-3:45pm

### JOLIET ROOM



PRESENTING  
IN PERSON

#### Joseph Muhuni, CPA CGA

Deputy City Treasurer,  
Revenue for the City  
of Ottawa

### PROPERTY TAX TRENDS

#### Overview

- Emerging Property Tax Trends In Canadian Municipalities
- Leveraging Tax Policy to achieve broader City objectives
- Keeping Taxes low while delivering services in a high-inflation environment
- Grants and Property Tax Reductions for Not-for-Profit Affordable Housing



BREAK

Tuesday, October 31, 3:45pm-4:15pm

31  
OCT

# CAGFO 2023 ANNUAL NATIONAL CONFERENCE



CONCURRENT

Tuesday, October 31, 4:15pm-5:15pm

## RICHELIEU ROOM



PRESENTING IN PERSON

**Charles-Antoine St-Jean, FCPA, FCA**  
CHAIR,  
Canadian Sustainability Standards Board (CSSB)



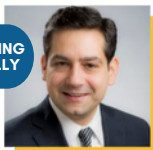
PRESENTING IN PERSON

**Renée Pichard, CPA CA**  
Member,  
International Public Sector Accounting Standards Board (IPSASB)

## JOINT STANDARDS FORUM: SUSTAINABILITY STANDARDS, PUBLIC SECTOR ACCOUNTING STANDARDS

**Sustainability:** Please join leaders from the Canadian Sustainability Standards Board (CSSB) and the International Public Sector Accounting Standards Board (IPSASB) for a question and answer style engagement session. During this discussion, our leaders are pleased to answer any questions you may have from the previous sustainability session.

**Public Sector Accounting Standards:** This is an opportunity to discuss issues around reporting information in public sector financial statements. While it typically engages in topics related to emerging issues and standards (public sector accounting standards) that are upcoming, out for comment and/or being implemented, any related topics are open for discussion.



PRESENTING VIRTUALLY

**Michael A. Puskaric, CPA, CMA**  
Director, Public Sector Accounting Standards for the Public Sector Accounting Board

The Director of the Public Sector Accounting Board will attend with his staff of experts in related topics. Possible topics could include the Technical Advisory Group; employee benefits; conceptual framework; reporting model; intangible assets, Public Sector Discussion Group, Indigenous Advisory Group, and the Government Not-for-profit Strategy. If attendees wish to discuss existing issues such as AROs, that's also up for discussion.

### JOINT STANDARDS FORUM

This is intended to be an open forum with participation from and between the attendees. If you prefer to send in comments or questions ahead of time, please send them to [office@cagfo.ca](mailto:office@cagfo.ca). These interactive sessions are always engaging – we look forward to welcoming you to this session.

THERE WILL LIKELY BE ADDITIONAL PEOPLE PARTICIPATING IN THIS FORUM ...



PRESENTING IN PERSON

**Lorrie Schmalenberg,**  
CAGFO Board President, Session Moderator

31 OCT

# CAGFO 2023 ANNUAL NATIONAL CONFERENCE



**CONCURRENT**

*Tuesday, October 31, 4:15pm-5:15pm*

## **FRONTENAC ROOM**

### **POLICE FINANCE FORUM**

Forums are intended to be interactive sessions with full participation from attendees. It is an opportunity for attendees to network and discuss current issues amongst themselves. Please turn on your cameras and take the opportunity to learn from your peers and participate in discussions.

The Police Finance forum will provide an opportunity in a Q&A format for participants to discuss and share experiences on budget/fiscal challenges that Police services across the nation are facing. Some of the topics may include firearm replacement, space and facility planning and funding/budget sustainability.

PRESENTING VIRTUALLY



**Earl Warwick,**  
**CPA CMA CTAJ**

*Director of  
Finance and  
Asset  
Management,  
Saskatoon Police  
Service*

PRESENTING VIRTUALLY



**Kirsten Hand, CPA  
CMA**

*Director, Finance  
and Assets Waterloo  
Regional Police  
Service*

PRESENTING VIRTUALLY



**Jeff Channell**  
*Executive Director  
Financial Services  
and Administration  
at York Regional  
Police*



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# CAGFO 2023 ANNUAL NATIONAL CONFERENCE



**CONCURRENT**

*Tuesday, October 31, 4:15pm-5:15pm*

## **JOLIET ROOM**

### **ASSET MANAGEMENT FORUM**

Forums are intended to be interactive sessions with full participation from attendees. It is an opportunity for attendees to network and discuss current issues amongst themselves. Please turn on your cameras and take the opportunity to learn from your peers and participate in discussions.

This will be an asset management forum discussing the current status of asset management practices and the involvement of accountants in asset management. Also to be discussed is the asset management training needs of accountants, the various training opportunities and funding available and their suitability.



PRESENTING  
VIRTUALLY

**Jude Pillainayagam,**  
**MBA, P.Eng.,**  
**MIAM, ISP,**  
*City of*  
*Coquitlam*

**BREAK -  
IN-PERSON**

*Tuesday, October 31, 5:15pm-6:00pm*

**EXHIBITORS**

**BALLROOM B/C** *Tuesday, October 31, 5:15pm-6:00pm*

*In-person exhibitors tear-down / leave ballroom between 5:15 pm and 6pm*

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OCT**

# CAGFO 2023 ANNUAL NATIONAL CONFERENCE



## NETWORKING

**PINACLE ROOM**

*Tuesday, October 31, 6:00pm-6:30pm*

*Paranormal Spooktacular Reception - in-person attendees/registrants, speakers, sponsors, exhibitors, CAGFO Board etc.*

## NETWORKING

**PINACLE ROOM**

*Tuesday, October 31, 6:30pm-midnight*

## IN-PERSON ATTENDEES - FUN NIGHT NETWORKING EVENT

*Join Us for networking dinner and for a Paranormal Spooktacular (meal included in your registration) in-person attendees/registrants, speakers, sponsors, exhibitors, CAGFO Board etc.*

*Delta Hotel, City Centre (here at the event hotel.) Business & business casual.*

IN PERSON ONLY

31  
October



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**TUESDAY - 5:15 PM - 6PM IN-PERSON EXHIBITORS MOVE OUT**



# CAGFO 2023 ANNUAL NATIONAL CONFERENCE



**BREAKFAST**

**BALLROOM B/C**

*Wednesday, Nov 1, 8:30am-9:30am*

**GFOA**

**BALLROOM A**

*Wednesday, Nov 1, 9:30am-9:45am*

## TERRY VELASQUEZ, CPA, CPFO - LET'S TALK ABOUT GFOA

PRESENTING VIRTUALLY



Terri Velasquez is the Finance Director for the City of Aurora. She is responsible for operations of the City's Finance Department and the overall management of the City's finances. Previously, Ms. Velasquez worked for the City of Colorado Springs in a number of capacities including Chief Finance Officer. Ms. Velasquez received a Master's degree in Finance and a Bachelor's degree in Accounting from the University of Colorado and is licensed as a Certified Public Accountant in the State of Colorado. She also holds a Certified Public Finance Officer designation from the Government Finance Officers' Association. Ms. Velasquez is the immediate Past President of the Government Finance Officers Association (GFOA).

**PLENARY**

**BALLROOM A**

*Wednesday, Nov 1, 9:45am-10:45am*

PRESENTING IN PERSON



**Susan Mowbray, MA**  
Partner, Economics  
and Research

## ECONOMIC UPDATE **MNP**

In an era defined by dynamic economic forces and global uncertainties, understanding the economic landscape at the local level is paramount. Susan offers a comprehensive glimpse into Canada's current economic situation, with a sharp focus on local dynamics. She will discuss immigration and housing and what the pivotal factors are that will shape the future of municipalities, from infrastructure investments to tax policies and the evolving nature of work. Join us for an in-depth exploration of these critical economic topics, where we'll uncover insights and strategies for navigating the challenges and opportunities that lie ahead for Canada's local economies.

1  
NOV

# CAGFO 2023 ANNUAL NATIONAL CONFERENCE



**BREAK**

*Wednesday, Nov 1, 10:45am-11:15am*

**KEYNOTE**

**BALLROOM A**

*Wednesday, Nov 1, 11:15am-12:15pm*

PRESENTING  
IN PERSON



**Michael Lewis**  
*Managing Director  
of Michael Lewis  
Training,  
Motivation and  
Development*

## **TOPIC: ACHIEVING BALANCE: HOW TO ACHIEVE A BETTER WORK/LIFE BALANCE!**

*Keynote Speaker*

COVID-19 was a game changer for many of us – some working from home, some working in a hybrid arrangement and others worked as normal. We learned again that balancing a busy and often challenging professional and personal life is never easy. Life brings us all daily challenges, but it is how we choose to address each of these challenges that defines us and the quality of life that we want and deserve. In this uplifting, positive, solutions-oriented presentation we'll explore some common-sense strategies that you can use today to achieve a better and more realistic work life balance...and live your best life.

Learning Outcomes:

- Discover why a better and more balanced begins with important conversations.
- Learn that creating and establishing boundaries serves us and others in our lives.
- Experience two powerful demonstrations on the effects of stress...and what it means.
- Examine why less is more, that you don't have to do it all and that its about quality over quantity.
- Learn why we need to "say when" when it comes to technology.

**CLOSING**

**BALLROOM A**

*Wednesday, Nov 1, 12:15pm-12:45pm*

**CONFERENCE CLOSING REMARKS**

**1  
NOV**



Canadian Association of Government Finance Officers  
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## Why Do I Need Risk Appetite and Tolerance Statements?

Ed McCaulley, CPA, MBA, Principal Consultant, F. H. Black & Company Incorporated

Have you ever been skydiving? I have not. To quote Clint Eastwood, “Jumping out of a perfectly good airplane is not a natural act.” Yet the US Parachute Association reported that in 2021, around 39,412 of its members made 3.57 million jumps.

Do you have an adjustable-rate (ARM) or fixed-rate mortgage? When I was younger and poorer, I considered an ARM before choosing a fixed rate. Back then, ARMs were trendy. They became less popular in the low-interest rate environment of our recent past. Perhaps they’ll gain popularity once again.

Do you drive faster than the speed limit? As a young man, I was clocked at 65 mph in a 35-mph zone. My defense? I was driving a straight-away on a clear, country road. The officer didn’t buy it, and I ended up spending two hours in remedial driving school for “aggressive drivers.”

Why all the questions? To make a point. Both the **ways** in which each of us measures risk and the **amount** of risk we’re willing to assume can vary widely. [Read More](#)

### ENFORCING INTERNAL CONTROLS TO MANAGE RISK

Gain tools to manage risks faced by the public sector.

- Learn best practices for internal controls
- Understand the (5) COSO components
- Develop risk assessments for governmental programs
- Review policies regarding disbursement of funds

And more!

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# SPEAKER BIOS

2023 CAGFO National Conference



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## INNOVATION THE WAY FORWARD



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HYBRID Conference  
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Oct 29 - Nov 1st, 2023



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2023 National Conference Oct 29 - Nov 1

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OCT

## Speaker Bios *In the order of appearance*



### **Wendy Stephanson, Bac Com CPA CMRP**

New City Manager, City of Ottawa

As City Manager, Wendy serves as Council's chief administrator leading the organization to deliver services across more than 100 distinct lines of business through 10 departments and 17,000 employees. Wendy is a strong financial steward who has devoted her entire career to public service. With more than 28 years with the City of Ottawa, she has held several leadership roles including most recently as Chief Financial Officer (CFO).

As CFO, Wendy was responsible for all financial aspects of the corporation, including the development of the \$4.14B operating and \$989.5M capital budgets, tax policy, long-range financial plans and \$1.8B annual payroll and distribution of pensions and benefits.

Throughout her tenure with the City of Ottawa, Wendy has established strong, collaborative relationships across the organization, local industry partners and key stakeholders at all levels of government. She is an accomplished servant leader who has a proven track record of developing, empowering and guiding diverse teams of people to deliver quality service.

In addition to her role with the City of Ottawa, Wendy has made significant impacts across the Province of Ontario. Through her collaboration with the Ontario Municipal Tax and Revenue Association's (OMTRA) Education Committee, educational material for the Municipal Tax and Revenue Administration program was developed and administered by Seneca College. This work was also included in the re-developed Municipal Practitioner's Guide to the Tax Sale Process that is used by municipal and legal professionals throughout Ontario. In 2017, Wendy received a Province of Ontario Volunteer Service Award for these contributions.

Wendy is also a member of the Big City Hub Task Force where the six largest cities in Canada collaborated to address the COVID-19 pandemic and develop a safe restart plan for Canada's economy.

Wendy holds a Bachelor of Commerce degree from Carleton University, is a Chartered Professional Accountant (CPA) and Certified Municipal Revenue Professional (CMRP). She is an active member of the Ontario Municipal Tax and Revenue Association, where she currently serves as a director on the board.



Canadian Association of Government Finance Officers  
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# Speaker Bios



## Lee Jeyes

*Acclaimed Business Futurist*

*Innovation Strategist*

*Former Head of Innovation,*

*Walmart Canada*

**KEYNOTE SPEAKER**

## Lee Jeyes

In our rapidly evolving business landscape, Lee Jeyes equips leaders with the tools and strategies needed to face these changes head-on and thrive.

As the most recent Head of Innovation at Walmart Canada, Lee led a team of researchers, creators, strategists and developers that continuously challenged the status quo.

Lee was the youngest store manager in both the UK and Canada for the world's largest retailer and was part of the launch of Walmart Canada's online grocery business which drove over \$500 million in business value in a two-year period.

His contributions to the industry have been recognized in publications such as the Progressive Grocer's Industry's Best and Brightest Under 40 in 2021.

Spearheading the launch and leading Walmart Canada's first innovation incubator - Blue Labs - Lee's primary role was to discover, intake and create solutions for the most complex challenges that customers and leaders are facing today.

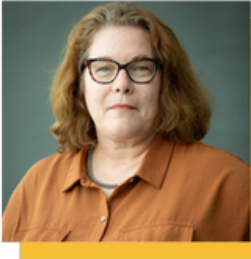
In his spare time, you can find him in Toronto walking along the water with his Great Dane, Wall or making music in his plant-filled loft.

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Canadian Association of Government Finance Officers  
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# Speaker Bios



## **Heather Miller, CPA CMA** **Assistant Auditor General**

Heather Miller has been with the OAG for more than 20 years in a variety of roles and has been serving as Assistant Auditor General since September 2021.

In her role as Assistant Auditor General, she is leading the OAG's audit transformation initiative, which is aimed at increasing the impact of our reports.

During her career at the OAG, Ms. Miller has worked on performance audits, financial audits, and special examinations and on a variety of portfolios, including immigration, foreign affairs, revenue, and health. She has also worked on the Practice Review and Internal Audit team. All of this experience has given her extensive, first-hand, and well-rounded knowledge of the OAG and its products.

Ms. Miller holds a bachelor's degree in business administration from Lakehead University in Thunder Bay, Ontario. She began her career in the private sector and joined the public service in 1998 at the Canada Revenue Agency.

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Canadian Association of Government Finance Officers  
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# Speaker Bios



## Greg Clark

Greg Clark is the Director of Capital Assets and Projects at the City of London, leading a team overseeing the management of Corporate Asset Management, growth capital funding and Tangible Capital Asset reporting. Working to deliver organizational value through improved data collection, tracking, analysis and reporting.

He graduated from McMaster University with a Honours Bachelor of Commerce in 1999 and attained his CPA (CMA) designation in 2010. From there he found his calling in the public sector, working at the City of Guelph over the past 12 years to champion innovation and progress within the City's capital planning and budgeting areas.

Prior to joining the City of London, he was leading Guelph's ERP program which included the implementation of new software to manage the Procurement, Inventory, Work Order and Asset Management functions of the entire organization. Greg's role as Manager, ERP Program saw him lead a team of 17 from across multiple functions in preparing for this substantial change. The success of a project of this nature requires a focus on building a culture of change.







Canadian Association of Government Finance Officers  
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## Speaker Bios



### **Shelley Stedal**

Shelley Stedal is the President of the Municipal Finance Officers Association (MFOA). She is the Director of Corporate Services /Treasurer with South Frontenac, (a progressive rural municipality of 20,000, north of Kingston) and is a seasoned Municipal Treasurer with over 30 years in rural, small urban municipalities as well as experience as a Senior Municipal Financial Advisor with the Ministry of Municipal Affairs and Housing (MMAH). Shelley is also an elected Council member in her home community of Quinte West. Shelley's career in Municipal finance has been with Single Tiers and Lower Tiers in both Eastern and Western Ontario. Shelley has also been a marker for the Association of Municipal Manager Association (AMCTO) courses, has delivered seminars and training, including the MFOA/GFOA Budgeting workshop series, and updated the AMCTO Municipal training units. Shelley is extremely proud of the work that MFOA has done over the years to build the Municipal Finance Sector both through education and training but also through strong networking. MFOA has been a huge resource to Shelley and she continues to work with the Association so the Municipal Finance professions of Ontario can continue to be a strong resource in a world of constant change.

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# Speaker Bios

**BLOOM**

## Tim Duhamel

Tim Duhamel is the founder and president of Bloom Centre of Municipal Education. A municipal veteran whose municipal career has spanned over 25 years, Tim has been a municipal finance manager, general manager, and CAO.

Tim's passion is working with municipalities to better their situation and creating educational material and conducting lectures for municipal professionals.

He has lectured as far away as Kiev Ukraine for the Federation of Canadian Municipalities. Tim has been the lead creator of education material and course delivery for GFOA Alberta, the Canadian Association of Government Finance Officers. He has conducted in-house training for numerous clients including the Federation of Canadian Municipalities. Tim's online education is enjoyed by numerous corporate clients Canada wide. He is also the leader of a thriving consulting practice.

Projects include:

1. Strategic plans (Municipal, Chamber of Commerce, Recreation Facilities)
  2. Inter-municipal cost sharing agreements and frameworks
  3. Long term tax strategies
  4. Organizational structure reviews
  5. Code of conduct investigations
  6. CAO hiring process
-



Canadian Association of Government Finance Officers  
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# Speaker Bios



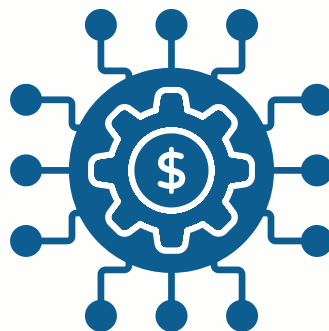
## Yvette Wu

CEO and Co-founder of Yield Exchange

Yvette Wu is an emerging leader in fintech with over 15 years of experience in credit union space and strategic consulting. She led the design and implementation of Vancity's first board approved Enterprise Risk Management Framework and the award winning 'Vancity Fair and Fast' Loan. She has also led within Fortune 500 companies, medium and large-scale social enterprises, and fast-paced tech startups. Her diverse industry and corporate background lend a unique mash up of experiences and skill sets.

Yvette is frequently featured as a speaker and panelist on topics ranging from FinTech innovation to women in finance and leadership. She was also winner of the 2022 Amazon Web Services SAAS North Competition and New Ventures BC Woman Led Venture. Yvette is also a published author in Fast Company and Entrepreneur.

**Yield Exchange**





Canadian Association of Government Finance Officers  
2023 National Conference Oct 29 - Nov 1

## Speaker Bios



### **Ed McCaulley, CPA JD MBA BBA**

Principal Consultant

F. H. Black & Company Incorporated

Ed McCaulley is a Principal Consultant at F. H. Black & Company Incorporated. Specializing in risk management, he collaborates with our clients to mitigate organizational risks by redesigning business processes and selecting, implementing, and supporting enabling technologies. For more than 25 years, Ed has been a driving force for insightful risk management, financial management, accounting, and internal auditing for organizations of all sizes. Before joining FHB, he was Vice President at one of the largest US banks, where he was hired to bring a rapidly growing business line into compliance with the bank's operational risk management policy and program that supported revenue growth. He obtained buy-in from a reluctant business that strengthened risk and control self-assessments (RCSA) and vendor management of outsourced processes, and ultimately passed regulatory scrutiny.

Ed is an attorney, holds a Certified Public Accountant (CPA) designation, a Juris Doctorate (JD), a Master of Business Administration (MBA), a Bachelor of Business Administration Degree (BBA) in Accounting, and is the author of "Back to Basics: Balance Sheet Reconciliations," which was featured in Internal Auditor Magazine.



# Speaker Bios



## James Spellos

James Spellos is the President of Meeting U. whose mission for over 20 years is to help people become more productive and comfortable with technology.



In 2022, Meeting Professionals International included Jim on their most influential list in the hospitality industry in honor of their 50th anniversary celebration. In 2021, Glisser named Jim one of the most influential people in virtual events.

[jspellos@meeting-u.com](mailto:jspellos@meeting-u.com)

He was a faculty member at New York University for 25 years receiving both their Award for Teaching Excellence and their Outstanding Service Award. In 2015, Jim was named one of the Meeting Industry's trendsetters by Meetings Today magazine.

<http://www.linkedin.com/in/jspellos>

Jim is on the Board of Directors for Rock and Wrap It Up, an anti-poverty, anti-hunger organization which recovers excess food from concerts, sports and other events. Jim co-created their Whole Earth Calculator app. He also speaks about food recovery and sustainability to groups around the country. In 2018 & 2019, BizBash named Jim one of their top 500 people in events for his work in sustainability.

Jim is an accomplished musician and songwriter who released his first solo album, Stroke of Genius in 2020. He has a certificate in Plant-Based Nutrition from the T. Colin Campbell Center for Nutritional Studies, is a certified Physician's Committee for Responsible Medicine's Food for Life Instructor, and supports Plant Powered Metro New York in educating people about a healthy diet and lifestyle, which helped to save his own life.

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# Speaker Bios



## **Olly Morrison, CPA**

Director of Corporate Services,  
Canoe Procurement Group of Canada



Olly is the Director of Corporate Services and Chief Financial Officer for the Rural Municipalities of Alberta and Canoe Procurement Group of Canada. Olly's team is responsible for Finance, Human Resources, and Information Technology for the association. Prior to joining RMA, Olly has spent over 20 years in Finance roles in both private and public sectors. Olly has a Bachelor of Commerce degree and holds a Chartered Professional Accountant (CPA) designation.



## **Jeff Nichol**

Director of Benefits,  
Canoe Procurement Group of Canada



Jeff is the Director of Benefits for Canoe Benefits and the Vice President of Public Sector Consulting at Lane Quinn Benefit Consultants. Jeff and his team is responsible for providing employee benefit, retirement and HR solutions to Canoe members across the Country. Jeff and his team has partnered with Canoe/RMA over the past 8 years and currently sits on the RMA Trade Advisory Committee.





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## Speaker Bios



### **Earl Hoeg, MBA**

Head of People and Places with People First Inc. Founder of Gray Matters Connections. Board Member – Real Property Institute of Canada. Passionate about helping good managers do great work.

Earl Hoeg is an experienced public speaker, workshop leader, and trusted advisor to leaders who want to create inspiring, engaging and connected workplaces. As a former senior executive in the Canadian Public Service in diverse roles from finance, real property, leadership development and program delivery, Earl doesn't want to just train your people he wants to help you transform your organization.

After 25+ years of leading virtual and in-person teams from five to 150+ people, Earl is on a mission is to support bold leaders and founders to make hybrid working not suck! He brings his enthusiasm, empathy, and breadth of leadership experience to all the services he offers. And with an MBA from Queen's University and certifications from Insights Discovery, the Center for Creative Leadership and powerful people analytics from Reworc, he has the proven techniques, tools, and partnerships to elevate your team's effectiveness.

If you want to awaken your team's possibilities and maximize your impact, please connect.



### **Natalia Szubocsev, CAIB MBA**

Natalia Szubocsev has fulfilled various roles over the course of her 15+ years of carrier in the public and industrial sector valuation industry, educating stakeholders about the importance of appraisals, managing RFP responses, site visits and overall communication with public sector clients. She currently oversees the operations of Appraisals International, a Canadian fixed asset valuation company with a global reach, specializing in appraisals for insurance and other purposes. Natalia holds a Master of Business Administration degree, CAIB designation and is currently working towards her risk management designation. She lives in Ottawa and is a proud mom of three daughters.



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[www.peoplefirst.ca](https://www.peoplefirst.ca)  
Halifax, Nova Scotia

[linkedin.com/in/earl-hoeg](https://www.linkedin.com/in/earl-hoeg)

peoplefirst



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OCT

## Speaker Bios *In the order of appearance*



### **Pamela Steer, FCPA CFA**

Pamela is the president and CEO of CPA Canada. Prior to assuming this role, she was the chief financial and corporate strategy officer at Payments Canada. She also served as chief financial officer and head of finance and employer services for the Workplace Safety and Insurance Board.

#### **Pamela Steer, FCPA CFA**

President and CEO CPA Canada and Board Member passionate about lasting Leadership, Transformation and Sustainability.

Twitter @pamela\_steer  
Toronto, Ontario, Canada

**Keynote Speaker**

In 2016, Pamela was named a Fellow of the profession, and in 2019, she was honored as Canada's CFO of the Year.

Pamela is an accomplished and dedicated community leader, serving on a number of boards and councils. She is also an active and founding member of the advisory board for the Institute for Sustainable Finance and helped found the Canadian Chapter of the Accounting for Sustainability CFO Leadership Network.



### **Stephenie Fox, FCPA FCA**

Since 2015, Stephenie has led the staff supporting Financial Reporting & Assurance Standards Canada's oversight councils and boards, which now includes the Canadian Sustainability Standards Board (CSSB).

Canada has long been known both for the quality of its standards and for the independent, objective, and transparent structures responsible for developing the standards and guidance used in this country. Stephenie has over 20 years of experience in independent standard setting and establishing and sustaining relationships with national and international standard-setting bodies.

#### **Stephenie Fox, FCPA FCA**

Canada's Senior Vice-President,  
Standards, CPA

Prior to her current role, she was technical director at the International Public Sector Accounting Standards Board – an independent standard-setting board of the International Federation of Accountants. Stephenie was previously a senior reviewer at the Canadian Public Accountability Board and spent 12 years as a principal working with the Canadian Institute of Chartered Accountants. She started her career at PricewaterhouseCoopers.





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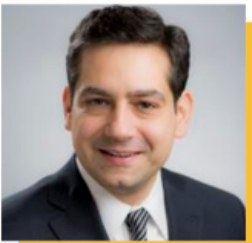
## Speaker Bios



### **Clyde MacLellan, FCPA FCA**

Clyde is currently chair of the Public Sector Accounting Board (PSAB) – Canada’s national independent public sector accounting standards setter. PSAB serves the public interest by developing high-quality accounting standards for the public sector that contribute to transparency, accountability and support decision making.

A retired Assistant Auditor General and former member of the Executive Committee of the Office of the Auditor General of Canada, Clyde has considerable experience in financial and performance auditing of Canadian public sector organizations and the promotion topics of strong governance, performance reporting, risk management and financial reporting and internal control within those organizations. He also has had experience with similar issues topics in the international public sector due to his work with organizations such as past responsibilities for the international audits of the International Criminal Police Organization (INTERPOL), The United Nations Educational, Scientific and Cultural Organization (UNESCO) and representing the Office of the Auditor General of Canada at the United Nations Panel of External Auditors and its technical working group.



### **Michael A. Puskaric, CPA CA**

#### **Director, Public Sector Accounting Standards for the Public Sector Accounting Board**

Michael is the Director, Public Sector Accounting Standards for the Public Sector Accounting Board. Michael has a broad base of experience based on over 20 years working in public, private and not-for-profit sector organizations.

His is a member of the special advisory committee to the Auditor General of Canada that provides advice and consultation on financial accounting and auditing matters. Michael is a part-time professor of public sector and not-for-profit-accounting at Toronto Metropolitan University and holds a Chartered Professional Accountant designation and a Master of Business Administration degree from the Schulich School of Business at York University.



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## Speaker Bios



### **Martha Jones Denning, CPA CA** **Associate Director Public Sector Accounting Board**

Associate Director Public Sector Accounting Board  
Martha Jones Denning is an Associate Director with Canada's Public Sector Accounting Board (PSAB). She has developed public sector financial reporting standards for over 30 years, leading projects to create many standards in the CPA Canada Public Sector Accounting Handbook. Martha is involved with various PSAB projects, such as PSAB's Concepts Underlying Financial Performance project, as well as PSAB's Public Sector Accounting Discussion Group, a public forum where public sector accounting issues are discussed.



### **Antonella Risi, CPA CA** **Associate Director, Public Sector Accounting Board**

Antonella Risi is an Associate Director with Canada's Public Sector Accounting Board (PSAB). In this role, she supports staff and the work of task forces made up of practitioners and users of financial reports to develop and amend public sector accounting standards.

Antonella has been developing public sector accounting standards for over nine years. Recently she led PSAB's Concepts Underlying Financial Performance project.

Prior to that, Antonella was the Director of Finance of a hospital in Ontario. In this role, Antonella was responsible for implementing a new accounting, budget and payroll system. She was also responsible for the monthly, quarterly and yearly financial statements of the entity.

At the start of her career, Antonella spent over 9 years at Deloitte in the public sector practice, performing assurance and consulting services for her many clients. Clients included provincial and municipal governments, hospitals, not-for-profit organizations, charities and school boards.



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## Speaker Bios



### **Des Seturam**

President & Delivery Executive, Vigilant Consulting Services

Des has over 20 years of experience in Oracle Applications, primarily dedicated to business transformation, advisory and implementation of Oracle solutions. Des is the President Vigilant Consulting Services Inc. and is responsible for delivering large-scale, complex ERP and HCM solutions that help clients to achieve their goals for the project.

## Vigilant

Prior to Vigilant, Des led the Oracle practice for Deloitte and IBM. Des has also worked with Ernst & Young and Oracle Consulting services.



### **Anitha Reddy**

Practice Director ERP and EPM

Anitha has over 10 years of experience with Vigilant leading and implementing Oracle Applications. Anitha has played multiple roles from being a hands-on functional consultant to being the Project Manager for large and small EPM/ERP/HCM implementations for several clients across the globe. Prior to Vigilant, Anitha was an Investment Manager at National Bank of Canada for over 10 years.

Free time in the afternoon of Nov 1st? Maybe checkout the beautiful fall colours. Or grab a beaver tail pastry in the Ottawa Market, yum!

[www.ottawatourism.ca/en](http://www.ottawatourism.ca/en)





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## Speaker Bios



### **Michael McCormack, BA CFI**

Director, Forensics and Litigation Support, MNP, Edmonton  
michael.mccormack@mnp.ca

Michael McCormack, BA, CFI, is an accomplished speaker and trusted advisor to organizations who are concerned about the impact of workplace and harassment investigations. Michael is a Director with MNP's Forensics and Litigation Support group in Edmonton, Alberta. He is responsible for investigations across Canada. He works with municipalities and governments, First Nations, corporations, on employee misconduct, risk assessments, due diligence, and harassment cases. Mike is designated as a Certified Forensic Investigator.

Mike has extensive knowledge and experience in the areas of employee misconduct and the investigation of harassment. He also helps organizations mitigate issues and strengthen anti-fraud and anti-harassment controls. With deep knowledge and experience in investigations and interviewing, Mike develops practical solutions and delivers results for his clients.

Before joining MNP, Mike served for 24 years at the Ottawa Police Service as a Detective Sgt in Financial Crimes and Proceeds of Crime. He has spent his career investigating financial crimes. He has experience investigating complex international financial crimes including a variety of fraud schemes, money laundering and proceeds of crime offences.





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## Speaker Bios



### **Charles-Antoine St-Jean, FCPA FCA**

#### **CHAIR, Canadian Sustainability Standards Board (CSSB)**

Charles-Antoine St-Jean comes to the CSSB with extensive standard-setting and leadership experience, most recently serving as the Regional Director - Americas with the IFRS Foundation®. In this position, he assisted with the implementation of the International Sustainability Standards Board (ISSB) operations in Montreal, QC.

Charles-Antoine's career was mostly spent with Ernst & Young (EY), retiring as a National Managing Partner in June 2017. Mid-career, he served as Comptroller General of Canada for several years before returning to EY. He has served as the (Interim) President and CEO of CPA Canada, where he initiated and led the bid proposal that led to the ISSB choosing Canada as the location from where it develops new standards.

Charles-Antoine also served as Chair of Canada's Public Sector Accounting Board, the Ontario Government Internal Audit Committee, and many not-for-profit boards.

[FRASCanada.ca/CSSB](https://FRASCanada.ca/CSSB)



### **Renée Pichard, CPA CA**

Member, International Public Sector Accounting Standards Board (IPSASB). Renée Pichard is a leader in Deloitte's Public Sector Assurance practice with over 28 years of diverse professional and executive leadership experience in the public and private sectors. She leverages her expertise to help public sector organizations navigate through change and improve their ability to provide reliable and relevant decision-making financial and sustainability information. Prior to joining Deloitte, Renée spent 17 years at the Office of the Auditor General of Canada where she held the position of Assistant Auditor General, Financial Audits. Renée has been contributing to the establishment of accounting standards in Canada and internationally for the past 15 years. She currently serves as member of the International Public Sector Accounting Standards Board (IPSASB), which has recently undertaken setting sustainability reporting standards for the public sector. In that role, she also serves as Chair of the natural resources accounting project.

# Speaker Bios



## **Kristen Michalko CPA CMA, Ravic LLC**

Managing Principal

Kristen Michalko is a Managing Principal consultant at Ravic LLC, owners of Enterprise Municipality Suite. Kristen graduated from the University of Alberta in 1995 and attained the CPA (CMA) designation in 1999. Kristen has worked with a variety of organizations over the years, but mostly recently has been drawn to working with local governments, helping them get the most value out of their investment in their financial systems.



## **Bret Merry, Oracle Technology Developer, Ravic LLC**

Managing Partner

Bret Merry is one of two inventors of the Enterprise Municipality Suite (EMS) software offered by Ravic. Bret has spent the past 12 working with Oracle technologies, 6 of those focused on municipalities. He is a proven team player with significant experience in the areas of application development, database, integrations, project management, and consulting.



## **Elizabeth Adams-Quattrociocchi CPA CGA**

Town of Aurora

Project Manager, Financial System Project / Deputy Treasurer

Elizabeth Adams-Quattrociocchi has been working in local government for over 10 years and most recently led the implementation of a new financial system at the Town of Aurora. Elizabeth graduated from Ryerson University in 2009 and attained the CPA (CGA) designation in 2013.

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## Speaker Bios



### **Joseph Muhuni**

Joseph Muhuni is the Deputy City Treasurer, Revenue for the City of Ottawa. He is responsible for ensuring that all revenue functions at the City of Ottawa are undertaken with a strategic corporate outlook, reflect industry best practices, and comply with statutory regulations. He oversees Tax Policy, Tax and Water Billing, Customer Servicing, Collections, Assessment Base Management, Corporate Payment Strategy and Operations for over 250,000 Water Meters.

Joseph has been actively involved in setting Tax Policy for the City of Ottawa for the last nine (9) years and implementation of transformational change within the organization; the most recent being the implementation of a New Water Billing System, implementation of a New Water Rate Structure, deployment of New Tax and Water e-Billing functionality and Online Change of Ownership Portal for lawyers.

He is a Certified Public Accountant and worked in the private sector for 11 years before joining the City Ottawa where he has been for the for the last 13 years.

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## **Earl Warwick, CPA CMA CTAJ**

### **Director of Finance and Asset Management, Saskatoon Police Service**

Earl is the Director of Finance and Asset Management at the Saskatoon Police Service (SPS). Trained and developed as a professional accountant, he has been involved with organizations in such diverse capacities as: auditor; business manager; salesperson; General Manager; self-employed professional contractor; governance and leadership; Chair of a Board of Directors; dispute adjudication; and, most recently, financial, procurement and asset management leader at the SPS.

Earl has been with the SPS since 2016, first hired as the Director of Finance overseeing budget & accounting activities, payroll and government funding. In 2019 the portfolio of Asset Management was added, contributing the responsibilities for facility, fleet, procurement and inventory management to name a few key facets of that aspect of the role. The greatest satisfaction Earl derives from work is to see his team members succeed and thrive, supporting them as required, with the short term result of getting a quality work product delivered on time, and the long term goal of preparing them to be leaders in their own right.



## **Jeff Channell**

### ***Executive Director Financial Services and Administration at York Regional Police***

JEFF CHANNELL is the Executive Director Financial Services and Administration at York Regional Police. Mr. Channell is a member of Canada's sixth largest municipal police service. York Regional Police is comprised of over 2,400 uniform and civilian members who provide services to York Region's 1.2 million citizens. York Regional Police is a recognized leader in building and strengthening partnerships with our many diverse communities and the service continues to implement strategies and programs to ensure service delivery is provided in a fair, inclusive and equitable manner. Ranked among Canada's fastest growing municipalities, York Region is forecast to reach 2 million residents and 1 million jobs by 2051. Positioning York Regional Police to meet its growth and evolving community needs over the coming decades is critical.





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## Speaker Bios



### **Kirsten Hand, CPA, CMA**

#### **Director, Finance and Assets Waterloo Regional Police Service**

Kirsten Hand is a Chartered Professional Accountant (CPA), CMA with twenty-five years of proven leadership in both finance and accounting in the telecommunication, information technology and Public Sector industries. She currently holds the position of Director, Finance and Assets Branch with the Waterloo Regional Police Service overseeing Finance, Payroll, Facilities, Fleet and Materials Management. Previous to this she worked with the Guelph Police Service, Bell Canada Inc. and IBM Canada Ltd.

Kirsten has a proven ability to initiate and implement process changes to drive productivity and profitability. She has experience managing a team of high performing professionals to drive results on time. Kirsten has excellent organizational skills and a drive to succeed which enables her to succeed in a changing, fast paced environment.

Kirsten is a graduate of the University of Western Ontario with a Bachelors in Financial and Economic Studies and holds a Diploma of Accounting from Wilfred Laurier University. She has also completed the Executive Development in Policing with the Canadian Police College, Police Leadership Program at the Rotman School of Management, University of Toronto, Global Studies Program through the Canadian Association Chiefs of Police, and was the past chair of the Ontario Association of Chiefs of Police Finance, Budget and Asset Management committee.

She lives with her spouse and two children outside of Fergus, Ontario and shares a passion for the outdoors spending her leisure time in Northern Ontario.

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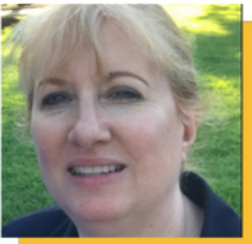
## Speaker Bios



### **Jude Pillainayagam, MBA, P. Eng., MIAM ISP City of Coquitlam**

Jude Pillainayagam is a senior engineer in municipal engineering sector and a Fellow of Engineers Canada. He is involved in Asset Management for nearly 20 years working at Metro Vancouver, City of Surrey and City of Coquitlam.

Jude possesses a diverse educational background and experience. He is also an accountant and a certified Information System Professional. He is a member of the Institute of Asset Management UK (IAM), and the Regional Director of Canadian Network of Asset Managers (CNAM) for BC and Alberta. Jude has carried out extensive work in the area of asset management and presented in many conferences.



### **Terri Velasquez, CPA CPFO**

Terri Velasquez is the Finance Director for the City of Aurora. She is responsible for operations of the City's Finance Department and the overall management of the City's finances. Previously, Ms. Velasquez worked for the City of Colorado Springs in a number of capacities including Chief Finance Officer. Ms. Velasquez received a Master's degree in Finance and a Bachelor's degree in Accounting from the University of Colorado and is licensed as a Certified Public Accountant in the State of Colorado. She also holds a Certified Public Finance Officer designation from the Government Finance Officers' Association. Ms. Velasquez is the immediate Past President of the Government Finance Officers Association (GFOA).

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Canadian Association of Government Finance Officers  
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## Speaker Bios *In the order of appearance*

1 NOV



### **Susan Mowbray, MA Partner, Economics and Research**

Partner, Economics and Research, MNP. Susan is a Partner with MNP's Consulting Practice in Vancouver and leads the national Insights and Analytics Practice. She is an economist with more than 20 years of experience in economic modelling and assessment in various contexts. Susan's work has included assignments for public sector organizations, industry associations and private companies and has spanned many industries. Susan focuses on assisting clients with the development of quantitative estimates to inform decision-making and policy development. She goes beyond the numbers to explain what this means for decision-making. She is frequently invited to speak on economic issues and provide insights to government and industry audiences. [susan.mowbray@mnp.ca](mailto:susan.mowbray@mnp.ca)



E: [Susan.Mowbray@mnp.ca](mailto:Susan.Mowbray@mnp.ca) T: 604.782.9935 Suite 2200, MNP Tower 1021 West Hastings Street Vancouver, BC V6E 0C3 Education Bachelor of Arts, Economics, Simon Fraser University Master of Arts, Economics, Simon Fraser University Associations/Certifications Association of Professional Economists of BC Canadian Association for Business Economics GBA+ Languages English



# Speaker Bios *In the order of appearance*

1  
NOV

<https://www.michaellewis.com/virtual-coaching>

## **Michael Lewis**

Managing Director of Michael Lewis Training, Motivation and Development

Michael Lewis is Managing Director of Michael Lewis Training, Motivation and Development, a London, Ontario-based training, and development firm that was founded in 1994 and specializes in developing and delivering personal and professional development presentations, seminars, webinars, workshops, and teambuilding facilitation to a wide range of clients. Born in 1961, He graduated from the University of Western Ontario with a B.A. in 1983, began a career in training in the corporate world, and eventually started his own training and development firm.

Michael Lewis is a very experienced and popular speaker and trainer. As of May 2023, he has spoken and/or presented workshops, seminars, webinars, and team-building sessions almost 6300 times in 404 different communities across Ontario. He has spoken and presented seminars and workshops on a wide variety of emerging and important topics to over the past 30 years at various conferences and from that unique perspective has been witness to an ever-changing world of work and has focused on common sense solutions for our business and often complex lives!





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# EXHIBITORS



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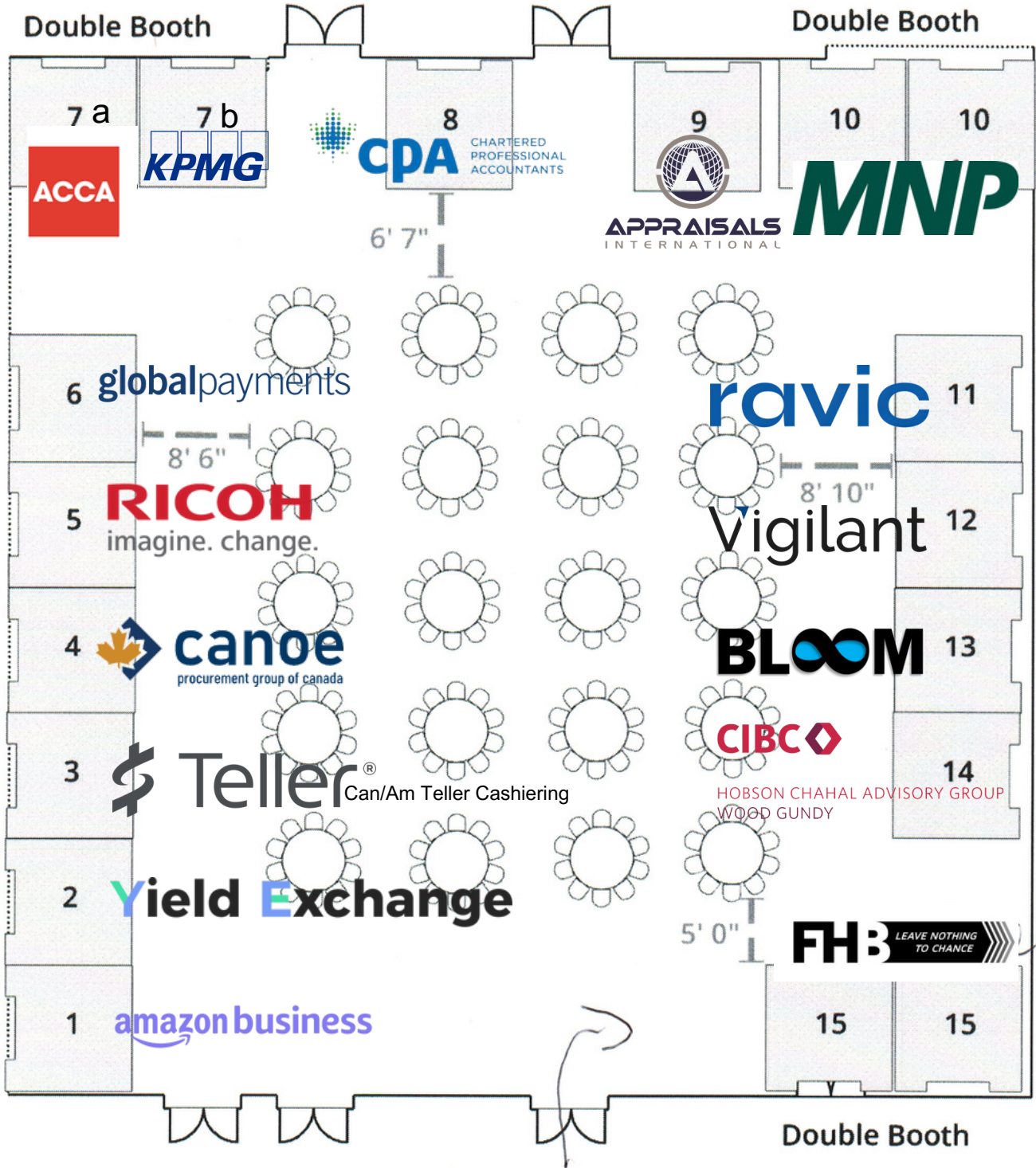
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CAGFO - Trade/show & Meals  
 2023 CAGFO National Conference, Ottawa



*Tradeshow Space: meals & breaks are here as well*

Lobby Entrance

# EXHIBITOR BOOTH NUMBERS & WEBSITES

F.H. Black - #15 double

MNP – #10 double

CIBC – #14

Canoe Procurement Group of Canada – #4

Ravic – #11

Bloom CME Inc. – #13

Appraisals International – #9

Can/Am Teller Cashiering – #3

Vigilant – #12

Yield Exchange – #2

Amazon Business – #1

Ricoh - #5

Global Payments - #6

CPA - #8

ACCA - #7a

KPMG - #7b



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## 2023 Sponsor/Exhibitor Bios



### Silver Sponsor



In-person  
Booth



Virtual Booth

For nearly 30 years, FHB has enabled public sector finance and budget teams across North America to improve and automate their most time-consuming and tedious business processes.

Our expert team begins by interviewing our clients and reviewing their current processes. We then collaborate with their team to streamline those processes and select, implement, and support the best enabling technology to meet their organization's distinct needs.

#### ***Here's what some of our clients have to say:***

"[F. H. Black & Company Incorporated] is just fantastic at what they do. They thoroughly understand the software and the nuances of municipal accounting."

-Theresa Musser, Financial Services Manager City of Lacombe, Alberta

"FHB's response time was exceptional. Their CPA's had the knowledge, skills, and experience needed to learn, document, and process the payroll system efficiently. They also had excellent interpersonal skills and were able to understand processes quickly."

-Amy Elgersma, Chief Administrative Officer, City of Iqaluit, Territory of Nunavut

"F. H. Black understands municipal accounting. There's a tremendous knowledge base within the company and they use that knowledge to come up with strategic recommendations that really help us leverage the software to our best advantage."

-Mark Beauparlant, Manager of Corporate Financial Services, City of Mississauga, Ontario





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*How exhibiting:*



In-person  
Booth

Virtual Booth

# 2023 Sponsor/Exhibitor Bios



## **MNP** Silver Sponsor

Public sector leaders are challenged daily to ensure operations run effectively and efficiently, whether at a municipal, provincial, or national level. We are committed to supporting you with innovative, transformative approaches so you can meet the evolving needs of your citizens.

At MNP, we're embedded in communities from coast to coast. We appreciate the differences from one town to the next, and we know the questions to ask so you get solutions that work.

Our local offices are backed by a team from across Canada, allowing you to access a network of expertise through an advisor who really gets your situation.

Our service offerings reflect an ever-changing regulatory environment and marketplace. Every service is tailored to meet your needs, to take advantage of opportunities and to minimize risk. Our partners and teams deliver insights, strategies and solutions that add value throughout your business' journey. <https://mnp.ca>



Canadian Association of Government Finance Officers

# 2023 Sponsor/Exhibitor Bios

*How exhibiting:*



In-person  
Booth

Virtual Booth

## Bronze Sponsors



HOBSON CHAHAL ADVISORY GROUP  
WOOD GUNDY

Since 1983, the **Hobson Chahal Advisory Group** has provided customized investment management solutions for numerous public sector institutions. At present, we manage over 100 institutional accounts, and oversee approximately \$3.3 billion in combined assets.

For more information, please visit our website:

[www.hobsonchahal.com](http://www.hobsonchahal.com)



**canoe**  
procurement group of canada

**The Canoe Procurement Group of Canada** works with municipal associations across the country. The associations work with Canoe to provide member organizations access to preferential pricing on trade-compliant purchasing programs that leverage the collective buying power of all involved.

The Canoe Procurement Group of Canada is a cooperative purchasing group created by its membership specifically to support public and non-profit organizations. Tracing its root to a handful of Western Canadian municipalities in 1936, Canoe has partnered with municipal associations across Canada and grown to represent over 5000 member organizations across Canada. Canoe is owned and operated by its membership through a not-for-profit municipal association.

Explore Canoe's wide variety of procurement programs at <https://canoeprocurement.ca/programs/>



# 2023 Sponsor/Exhibitor Bios

## Bronze Sponsors



KPMG Canada is home to a diverse workforce that inspires confidence, empowers change and drives innovation. In British Columbia, KPMG is one of the largest accounting services firms. Our team of specialists bring their diverse perspectives, experiences, and passion to work every day to support Canadian organizations. Across our Audit, Advisory, and Tax services, our goal is to be a difference-maker by delivering innovative ways of thinking, digitally enabled solutions and exceptional service to help our clients manage risks, seek out new opportunities and stay competitive.

Digital transformation is not a linear process. It is an evolution that helps ensure organizations keep pace with the expectations of their stakeholders. Digitally enabled, data-driven organizations can better anticipate the needs of their customers, more efficiently integrate into their value and supply chains, and build agility into their systems and processes. This allows them to respond more quickly to market forces, capitalize on digital transformation opportunities and deliver exceptional customer experience. In order to derive true business value and enable an agile and continual approach to digital transformation models, organizations require:

- A clearly defined digital transformation strategy and roadmap based on organizational objectives
- Leadership buy-in and support
- Consensus amongst internal stakeholders regarding the intended outcomes and metrics to measure against
- A robust data and analytics strategy that tracks progress against objectives and signals requirements for course corrections based on changing market forces
- The right technologies and enterprise platforms to enable the target operating model
- Ongoing change management and digital adoption initiatives to help ensure continuous learning and improvement

<https://kpmg.com/ca/en/home/market-insights/digital-and-transformation.html>



# 2023 Sponsor/Exhibitor Bios

## Bronze Sponsors



### ravic

Specializing in Oracle technologies and municipality software, the team at **Ravic** has a passion for developing and delivering high-quality innovative solutions designed to meet the needs of local governments. Helping municipality customers maximize value and benefit from their software investments is one of Ravic's primary objectives. We do this with the Enterprise Municipality Suite (EMS). EMS is a suite of applications designed to manage Animal Licensing, Business Licensing, Cashiering, Cemetery, Landfill, Property Taxes, Utility Billing, and give citizens a real-time view of their account(s) through the Citizen's portal. Each module is designed with the flexibility to be configured to your municipality needs.

Built on Oracle's Application Express (APEX), utilizing the most up to date integration technology, Ravic integrates our Enterprise Municipality Suite with your existing ERP system and shares data in both directions, eliminating duplicate entry and reducing reconciling concerns between systems.

It is Ravic's mission to support our clients in achieving their business goals by implementing solutions for their unique requirements while developing long-term relationships. Building long lasting relationships, our commitment to customer service and satisfaction, and high quality-delivery is the foundation of our business approach and the product of our proven success.

Ravic has a dedicated team with a purpose to improve applications addressing the needs of municipalities throughout the United States and Canada.



# 2023 Sponsor/Exhibitor Bios

## Bronze Sponsors



# BLOOM

**Bloom Centre for Municipal Education (Bloom)** is an education and consulting firm dedicated to empowering municipalities across Canada. The company was founded in 2016 uniquely by municipal professionals and elected officials. The Bloom team has an intimate understanding of the challenges municipalities face, including those related to financial management, strategic planning, and governance.

The Bloom advantage is driven by Tim Duhamel, founder and President. He is a former municipal finance professional, Municipal General Manager, and CAO who has led municipalities through natural disasters, negotiations, capital plan development, project prioritization, decision making, and Council/Administration relationship improvements. He has had over \$2 billion in capital decisions and \$4 billion in operating budgets under his guidance and is considered one of the top municipal professionals in Canada.

Bloom is supported by a team of associate consultants with backgrounds in governance, finance, leadership, CAO duties, municipal governance, project management, and communications. The Bloom consulting service menu and advisory knowledge is broad and is in high demand with numerous long term and repeat clients. Bloom professional development programs have proven to be the one of the best in the business with numerous corporate clients Canada wide. Bloom's in-person and online education program provides the highest quality municipal education in North America getting thousands of views per year. Duhamel has firmly established Bloom's capacity to develop and facilitate multiple municipal courses on topics ranging from strategic planning, financial planning, budgeting, leadership and elected official skills. Reach out to Tim Duhamel and begin experiencing the Bloom advantage! <https://bloomcme.com/#ethics-essentials-in-the-municipal-sector>

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Teller Cashiering is the leading payments solution for government agencies in North America. Designed especially for government by Can/Am Technologies, Inc., the Teller solution includes software for cashiering, point of sale, back office, and online customer payments. The SOC2 certified technology is feature-rich, easy-to-use, and integrated to the leading industry software your agencies already use. Our clients love Teller for robust reporting, collection, cash controls, and revenue management. For more than 20 years, we are proud to provide unmatched service to our many government partners across Canada and the United States. Learn more at [goteller.com](https://goteller.com)



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At Vigilant, our mission is to deliver impactful and successful outcomes to companies we serve. Our goal is to develop deep and lasting relationships with the clients we partner with by exceeding expectations – in our innovative solutions, the quality of our services, and the value we deliver.

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**Appraisals International** is a proudly Canadian asset valuation company with a global reach. We specialize in providing independent and impartial appraisal services for insurance and financial reporting purposes across the entire public sector. Our expertise comprises heritage and conservation assets, infrastructure assets, public buildings, public utility plants, and recreational assets.

At Appraisals International, we value accuracy and provide a flexible and collaborative approach to our clients' needs. We believe in fostering a culture of diversity and respect while striving to deliver service excellence to our clients in Canada and beyond.

Our team of expert appraisers hold designations from the Royal Institution of Chartered Surveyors (RICS) and the American Society of Appraisers (ASA).

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- Ensuring the right allocation of value for specified fixed assets for insurance or financial reporting purposes
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### amazon business

#### **Amazon Business Canada**

Customers choose Amazon for its convenience, selection, and value. But businesses and organizations—from sole proprietorships to public entities, large enterprises, and everything in between—have different needs than individual buyers. That’s why we created Amazon Business. Gain insight into spend and leverage added capabilities like setting purchasing policies, adding users, managing deliveries, and more that are not available with a typical Amazon account. Unlock even more capabilities and offers by becoming a Business Prime member when you pay for a yearly subscription for your organization. [What is Amazon Business? https://business.amazon.ca/](https://business.amazon.ca/)



### ACCA

#### Think Ahead

**ACCA** (the Association of Chartered Certified Accountants) is the global body for finance professionals. We’re a thriving global community of 233,000 members and 536,000 future members based in 178 countries and regions, who work across a wide range of sectors and industries. We uphold the highest professional and ethical values. Our scale and experience helps public sector finance teams deliver key front line services. So, if you’re looking to add to your finance team look for the four letters that stand for global expertise and whose members are at the forefront of public sector finance. Find out more at [accaglobal.com/frontline](https://www.accaglobal.com/frontline) ACCA is not affiliated with any Chartered Accountant (CA) organization or Chartered Professional Accountant (CPA) organization.

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### **Yield Exchange**

**Yield Exchange was designed to digitally transform the way institutional depositors shop for rates.**

The way institutional depositors search, compare, and negotiate for GIC rates is fundamentally flawed - we're excited to change that. Our goal is to digitally transform the way depositors lock in GIC rates by bringing unparalleled transparency into the investment process.

We're building an all-in-one treasury management platform that connects depositors directly to financial institutions like Vancity, Laurentian Bank of Canada, First West Credit Union, and many more. With Yield Exchange, depositors can easily diversify their portfolios, reduce fraud risk, and make informed investment decisions every single time.

<https://yieldexchange.ca/>

# 2023 Exhibitor Bios



## **Chartered Professional Accountants of Canada (CPA**

**Canada)** is one of the largest national accounting organizations in the world and is a respected voice in the business, government, education and non-profit sectors.

CPA Canada is a progressive and forward-thinking organization whose members bring a convergence of shared values, diverse business skills and exceptional talents to the accounting field. Domestically, CPA Canada works cooperatively with the provincial and territorial CPA bodies who are charged with regulating the profession. Globally, it works together with the International Federation of Accountants and the Global Accounting Alliance to build a stronger accounting profession worldwide. As one of the world's largest national accounting bodies, CPA Canada carries a strong influential voice and acts in the public interest.

### MISSION

CPA Canada enhances the influence, relevance and value of the Canadian CPA profession by:

- acting in the public interest
- supporting our members
- contributing to economic and social development

### VISION

The Canadian CPA is the pre-eminent, globally respected business and accounting designation.

### VALUES

We create trust by living by our values:

- act with integrity
- foster excellence
- be accountable
- work collaboratively
- respect others

<https://www.cpacanada.ca/>



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## 2023 Exhibitor Bios



**globalpayments**



Global Payments is a leading payment technology company, providing a complete commerce ecosystem to businesses of every size. With over 50 years of payments experience and expertise, we deliver the continuous innovation that our partners and customers need to grow. It's why we're trusted in over 4.6 million customer locations around the globe.

Drew Eidsvig  
Business Development Manager  
drew.eidsvig@globalpay.com  
D: 431-306-0022  
C: 204-891-8301

At Global Payments, we specialize in credit card processing, enabling the seamless acceptance of any form of payment through the largest product suite available in the market: point-of-sale, ecommerce, mobile commerce, omnichannel, integrated software, reporting, analytics, and a broad suite of industry-specific solutions, which cover community services, recreation, taxes, utilities, and many others that would benefit CAGFO attendees.

We deliver software and services at scale to millions of companies around the world, from ambitious startups to global enterprises, from small towns to large cities. Whatever your size and ambitions, we'll help you deliver compelling customer experiences and reach your goals.

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## 2023 Exhibitor Bios



**RICOH**  
imagine. change.



RICOH Digital Services empowers the digital workplaces of today and prepares them for tomorrow.

Through our portfolio of Business Process Management services and solutions, our experts are committed to helping your municipality optimize and secure your day-to-day business operations and accelerate your digital transformation journey.

Whether you want to grow, recover revenue, enable hybrid work environments, or create a more sustainable business model, we're here for you.

As a partner of over 300 Canadian Municipalities & First Nations, Ricoh understands the needs of the finance office. We make work easier for you and your staff, so you can focus on the effectiveness and efficiency of our towns and cities.

Ricoh Canada is a member/supplier of the CANOE Procurement Group Technology program. Manual workflows slow municipal business. Transform paper-based workflows into streamlined digital processes that save you time and reduce your costs.

<https://www.ricoh.ca/en-CA>

Reminder to registrants to check out  
our exhibitors virtually too, in the  
Exhibitor Hall at

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Canadian Association of Government Finance Officers

**Thank you to our over 32 speakers** for sharing their time and expertise with us throughout our **CAGFO 2023 Annual National Conference.**



**Breast Cancer Action Ottawa will receive a donation from CAGFO, on behalf of those Speakers that have elected to waive their speaking fee.** BCA is the designated local host conference city charity for this conference. Please visit their [website](http://www.bcaott.ca).

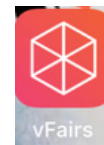
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# Questions?

Contact Marie-Louise Doyle,  
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