



# The Baltimore Ledger



March 2007

[www.aga-balt.com](http://www.aga-balt.com)

Baltimore Chapter

## March Luncheon Information

Early Career Focus: *Creating Tomorrow's Accounting Executives*

### When:

Thursday, March 15, 2007

11:30 - 12:00 pm Registration/Networking  
12:00 - 1:00 pm Buffet Lunch  
1:00 - 3:30 pm Presentation

### Where:

Snyder's Willow Grove Restaurant  
841 N. Hammonds Ferry Road  
Exit 8 off 695 Beltway  
[www.snyderswillowgrove.com](http://www.snyderswillowgrove.com)

### Price:

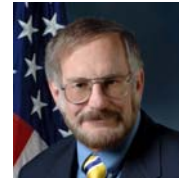
\$ 30 AGA Members  
\$ 45 Non-Members

### Contact:

410-965-9716 (leave a message) or email  
[agabaltimore@yahoo.com](mailto:agabaltimore@yahoo.com) by March 9th.

This training is worth **2 CPEs**.

## President's Message



Temperatures are starting to rise and we are days away from turning our clocks ahead in anticipation of spring's arrival. It seems that the worst of the winter may be over. However, some of us winter sports enthusiasts have not had enough and will travel to the snowy areas of the country to take complete advantage of the season.

I want to thank Chip Cottrell and Rick Potocek for their presentations on Construction and Purchasing fraud during our February joint training session with the Institute of Internal Auditors. They brought their personal experiences to the table. Our next session, scheduled for Thursday, March 15<sup>th</sup>, will provide a focus on career development. We hope that you will attend.

It was good to see so many Baltimore chapter members at the AGA's Fifth Annual National Leadership Conference held February 12<sup>th</sup> and 13<sup>th</sup> in Washington, D.C. The speakers provided very informative talks on "Forging New Paths to Improved Accountability." I am sure the practical skills they presented should help you improve the service you provide to your organization and the public.

As promised, we will continue our discussion about leadership qualities and how to be a successful leader. Three ingredients—the leader, communication, and the situation—when properly blended will help individuals achieve the established goals.

**The Leader – Knowledge is Power** - To be an effective leader, you must have an honest understanding of yourself and know your staff, their differences and their similarities. Know who needs what to be motivated, especially in this age of fiscal challenges, and you must be willing to share your knowledge.

**Communication – The Medium is the Message** - Good communication builds confidence, whether it is a behavior, verbal, or written. A leader must convey the facts and information effectively, and without a personal bias. This provides for effective 2-way communication.

**The Situation – By far the best proof is experience** - While situations may be similar, they are never the same, and thus what is effective in one situation may not be effective in another situation. It is up to the leader to provide an appropriate remedy for each problem through personal involvement. Effective leaders hold themselves and their staffs accountable for their performance.

Next month I will provide you with a list of tips from A to Z about effective leadership. ❖

## HIGHLIGHTS IN THIS ISSUE

- 2 March Speaker's Bios
- 3 AGA Scholarship Information
- 4 February Training Recap
- 5 Community Service Event
- 6 Membership Recruitment Contest
- 7 CGFM Review Course Information

## March Speakers Bios

March is Early Career month at the Baltimore Chapter and we've invited 2 speakers, Steve Anderson and Ann Bromery, to discuss the topic '*Creating Tomorrow's Accounting Executives*'. The Chapter has invited accounting students for Morgan State and Bowie State Universities to attend.

**Steven P. Anderson** is the Deputy Chief Information Officer (CIO), Division of Information Technology (DIT), Business Administration for the Federal Deposit Insurance Corporation (FDIC). He assumed this position in June 2005. Mr. Anderson brings a wealth of experience and professionalism to his current position. He is presently responsible for the program management, finance and contracting, internal controls, and administrative services in DIT.

Mr. Anderson has been with the FDIC since 1986 and was formerly the Deputy Director of the Division of Finance (DOF). While in DOF, he was promoted through a series of challenging assignments (covering corporate strategic planning and budgeting, cost management, financial reporting, travel services, internal controls, financial systems, accounting policy, audit coordination, and administrative services) to Deputy Director, Resource Management. During his tenure at the FDIC, he led the largest IT development project in the history of the Corporation, successfully merging the financial systems of the FDIC and Resolution Trust Corporation. Before coming to FDIC, Mr. Anderson was employed with the U.S. Office of Personnel Management (OPM) where he started his government career as an intern and ended his service as OPM's Chief Accountant. He has also served as an adjunct faculty member at the University of the District of Columbia.

Mr. Anderson holds a Bachelor of Science degree from Cheyney University in Pennsylvania. He was the first student in the history of Cheyney to be named to the U.S. Academic All-American football team. He

graduated with high honors and won a NCAA postgraduate scholarship. Subsequently, he earned a Masters in Business Administration degree and became a Certified Public Accountant in the District of Columbia.

**Ann Bromery**, *Chief Financial Officer*, joined The Living Legacy Foundation in November 2005. Ann has over 20 years experience in Accounting, Finance, and Operations for the Real Estate, Banking and Financial Services Industries. Her expertise is in designing Financial Operations, System Integration and Process Improvement customized to specific industry requirements. Prior to the Living Legacy Foundation, she spent 8 years with AscendOne Corporation in Columbia MD, 8 years at Eastern Savings Bank in Hunt Valley, MD, and 4 years at various Property Management and Real Estate Development companies in the Maryland/DC area.

She sits on the Board of Family and Children Services of Howard County and Horizon Foundation – Elkridge Advisory Board. She also belongs to the Philanthropy group "The Women's Giving Circle" which provides resources to underprivileged women in Howard County.

Ann earned her undergraduate degree in Business with a double major in Accounting and English from the University of Massachusetts. She is a Certified Treasury Professional through the Association of Treasury Professionals, a global resource and advocate for the finance profession.

Ann has 2 children, Hannah and Grace, and lives in Hanover, Maryland. Hannah is a freshman at Howard High in Columbia, MD and is an experienced pianist. Grace is in 6<sup>th</sup> grade in Elkridge, MD and dances with the Ballet Royale Institute of Maryland in Columbia, MD. ❖

## Registration Open for April Fraud Conference 8 CPEs (includes 2 Ethics CPEs)

Thursday, April 5, 2007 from 8:00 am to 4:30 pm

Maritime Institute of Technology

695 South to 295 South; Exit West Nursery Rd. (Park in Lot A or D).  
[http://www.mitags.org/text\\_directions](http://www.mitags.org/text_directions)

Cost is **\$120** for members and **\$135** for non-members

Register by March 30, 2007 by emailing [agabaltimore@yahoo.com](mailto:agabaltimore@yahoo.com) or by calling 410-965-9716. (Please make sure you either call or email, not both.)

Speakers bios will be presented in the April newsletter. ❖

### Featured Speakers

**Kathy Buller**, Chief Counsel to the Inspector General, Social Security Administration

**Arthur A. Hayes Jr.**, Director of the Division of State Audit for Tennessee

**Johnnie E. Frazier**, Inspector General, U.S. Department of Commerce

**Jacqueline Benjamin**, Senior Stakeholder Liaison, IRS

**Timothy Greene**, Special Agent in Criminal Investigations, IRS

## February Board Minutes

A board meeting of the Baltimore Chapter of the Association of Government Accountants was held at the Social Security Administration on Wednesday, February 7, 2007. There were 9 board members in attendance, including one participating via telephone. The meeting was called to order at 2:00 p.m. by Steve Schaeffer, the presiding officer.

Mr. Schaeffer asked for a motion to accept the meeting minutes from the January 3, 2007 meeting submitted by the secretary, Deborah Kinsey. The motion carried.

### **Education and Programs:**

JoAnn White-Burnett reported on the audio conference and the February joint meeting with the Institute of Internal Auditors. The April Fraud conference speakers have been finalized.

### **Meetings:**

Deborah Kinsey reported that a majority of the board members voted via email to approve the prices for the April 2007 Fraud conference to be \$120 for members and \$135 for non-members for 7 CPEs.

### **Awards:**

Deborah Kinsey suggested that the board consider submitting nominations to the American Institute of Certified Public Accountants for the Outstanding CPA in Government Award. The board will study the idea and come up with recommendations for how the process to determine chapter nominations from the three categories would work (1) Federal (2) State (3) Local.

### **Membership:**

Dellareese Morton-Smith reported that we have 281 current members, 22 new members, and 46

suspended members. Steve asked for a copy of the list of suspended members. A motion passed for the chapter to offer six \$50 savings bonds to individuals who sponsor the most new members into AGA Baltimore Chapter during the September 1, 2006 through April 30, 2007 time period.

Modifications were suggested to the membership committee's Internet survey questions. A motion passed to approve the survey and to issue it for a two month period. The cost will be \$14.95 per month.

A motion passed for the Membership committee to send out letters to recruit new members.

### **Community Service:**

Ms. Kinsey reported that we have three volunteers so far to serve hot meals to the needy at the Our Daily Bread Soup Kitchen in Baltimore in March. We will work to submit a photo of this volunteer activity to the AGA national office to try to win a free national conference registration.

### **Early Careers:**

The EC committee selected four new recruits for whom the chapter paid their first year of membership in AGA.

### **New Business:**

The chapter needs to solicit names for the hotel scholarships offered by National AGA for the Professional Development Conference. A condition of the scholarship award is attending a Sunday meeting at the beginning of the conference. We will also work to determine who will be attending the March 30<sup>th</sup> - 31st AGA Sectional Leadership Meeting in Lexington, KY. The AGA officers will be soliciting nominations.

The meeting adjourned at 2:55 p.m. ❖

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## Now Accepting 2007 Scholarship Applications

Are you or a family member pursuing undergraduate or graduate studies in disciplines such as accounting, auditing, budgeting, economics, finance, information technology, public administration, etc.? If so, consider applying for an AGA National Academic Scholarship today!

Each year, AGA National awards:

- Up to four \$3,000 full-time merit scholarships to AGA members and their family members,
- One \$1,000 part-time merit scholarships to AGA members and their family members, and
- One \$3,000 community service scholarship.

The **deadline for receipt of applications is March 30, 2007**. Apply now and take full advantage of all the benefits of AGA membership.

Visit <http://www.agacgfm.org/membership/awards/> for a scholarship application or contact Rosanne Ortiz for more information at [rortiz@agacgfm.org](mailto:rortiz@agacgfm.org). ❖



## February Training Recap

On Wednesday, February 21, 2007, Chip Cottrell and Richard Potocek from Deloitte Financial Advisory Services gave a presentation on *Construction and Purchasing Fraud* to 135 members of the Institute of Internal Auditors and the Association of Government Accountants.

The speakers discussed basic fraud concepts, which included the definition of fraud, types of fraud and the 'fraud triangle'. The 'fraud triangle' details 3 conditions that normally exist when a fraud is perpetrated: opportunity, incentive and rationalization.

After defining construction and procurement fraud and informing the audience about various construction fraud schemes, Mr. Potocek and Mr. Cottrell told some interesting stories about their experiences with construction and procurement fraud. One example was the story of a fellow FBI employee who worked in the photo shop at the FBI Office. Another agent was on e-Bay looking to purchase a camera for personal use and noticed that someone from his office was selling the exact same cameras used by the FBI for surveillance and the background of the picture on e-

Bay was the exact same carpet they had at the FBI Office. Needless to say the Agent set up a sting and the photo shop employee no longer works at the FBI.

Next the speakers described the different types of Anti-Fraud Programs and Controls. These included effective risk assessments, the auditor's responsibilities for identifying fraud and management's role in establishing key controls to deter fraud. A detailed discussion was given on the Fraud Risk Assessment Process, including a list of things to consider in the assessment, who should be involved in the process and what anti-fraud activities can be employed to lessen risk.

The audience was shown a video titled "Tone at the Top" which told of one man's story of how he defrauded his company, why he did it and how it negatively affected his life.

This three CPE session was very interesting and informative. The audience enjoyed hearing real life stories of how the speakers discovered fraud in various organizations. ❖



*Presenters Rick Potocek and Chip Cottrell Jr.*



*Rick Potocek presenting*

## AGA Baltimore Chapter 2007 Training Schedule

DATE	TOPIC	CPEs
April 5, 2007	Fraud Conference	8
May 24, 2007	Awards Luncheon	1
TBD	Board of Directors Luncheon	--

## Member Profile



This month's member profile features **Chasity Crawley**.

Chasity is currently a financial management analyst in the Office of Finance for the Social Security Administration (SSA). Her responsibilities include assisting with the day-to-day operations, support,

review and implementing the agency's third party draft and purchase card programs. Prior to working for SSA, Chasity worked in the private sector as an operations manager at a local financial advisory firm and as a mutual fund specialist at a southwest regional security firm. Chasity graduated Magna Cum Laude from George Washington University in Washington, D.C. where she was a member of the women's basketball team whose greatest accomplishment was making it to the NCAA Elite Eight.

Chasity has been part of the AGA since her entrance into the federal government in September 2004. She has held key leadership positions in the Chapter. She was Secretary during the 2005-2006 program year and she is currently serving as the Co-Director for the Certified Government Financial Management (CGFM) Committee. Chasity believes that AGA is essential in helping those new into the federal government obtain a broader outlook on policies and trends affecting federal agencies on a daily basis. It is this broader outlook that helps provide a clearer understanding of why we do what we do. Aside from attending monthly meetings, Chasity believes it is also important for early career employees to get involved with AGA in order to learn from others within the same agency but outside of those you work with daily as well as learn from those outside the same agency. ❖

## Member News

Congratulations **Gernard Gray** of the Social Security Administration. Gernard recently passed all three parts of the Certified Government Financial Managers (CGFM) Exams. Way to go Gernard! ❖



## Community Service Event - Our Daily Bread

AGA Baltimore Chapter will be volunteering and making a cash donation to the Baltimore-based *Our Daily Bread* organization in March 2007. We invite you to volunteer at *Our Daily Bread* "soup kitchen" at 411 Cathedral Street in downtown Baltimore on Saturday, March 17<sup>th</sup>, from 9 a.m. to 1 p.m., to assist in serving a hot meal to the needy. We would like to have a big turnout of volunteers. Please contact Deborah Kinsey at (410) 966-6957 or [deborah.kinsey@ssa.gov](mailto:deborah.kinsey@ssa.gov) if you are interested in serving this worthy cause as soon as possible, but no later than March 9, 2007. She has important information she needs to share with you about the event and also must confirm our volunteer count prior to the event. The organization needs to

ensure they have enough servers each day to meet the needs of the guests. Thank you.

**Our Daily Bread** provides a hot, nutritious lunch for anyone in need every day of the year. They also serve weekday breakfast to the elderly and those with special needs. In addition, groceries are made available to members of the "Food Club" and ODB serves as the mailing address for guests who have no permanent residence. Recognizing that their guests often need more than food in their quest for self-sufficiency, Catholic Charities has established two additional services at ODB that provide emergency services and employment assistance. ❖

## Professional Development Conference- Early Registration Ends May 25<sup>th</sup>

Save \$100 by registering early for the 56<sup>th</sup> Annual Professional Development Conference (PDC) to be held June 24-27, 2007 in Nashville, Tennessee. Early registration fees for AGA Members are as follows: \$775 to register on-line or \$800 to fax or mail your registration. After May 25<sup>th</sup>, fees increase to \$875 for on-line registration and \$900 for faxed for mailed registration.

For more information on the PDC, visit <http://www.agacgfm.org/pdc2007/registration.htm>. ❖



## Time for a Career Check-Up by Robin Ryan, Career Coach

Worried about your job security? Unhappy with your current position? Hoping to get a raise or promotion? Time to review your career management strategies to be sure you are in top form to move up or on. In today's changing workplace, the average worker will hold more than 11 jobs during their working lifetime. Since career management is now your responsibility, learn where you stand with this brief check-up.

### Have you established your career identity?

Your professional reputation -- what bosses, co-workers, associates think about you -- is more important than your resume. It's others who decide your fate when it comes to raises, promotions and determining who to hire. So this year work on your strengths -- the natural talents you excel in. Results from an exclusive CEO survey we conducted advise people to create a reputation of being very good at something (i.e. writing, sales, designing, client relations, etc.) to advance and insure lifetime success. Foster your growth by networking, the top executives advised, both inside your company and with peers in associations and professional groups. Networking is the best way to get noticed and insure a future with many career opportunities beginning sent your way.

### What new skills will you pick up this year?

"Life-long learning is essential to keep yourself marketable", recommends CEO and *How to Work Smart* author Melinda Howard Erickson. If more education isn't in your plans, it may need to be. Employers demand highly productive workers that bring a contemporary skill set. You need to continuously add to the skills you can sell to an employer. Too many workers let this extra effort slide, only to see promotions go to other, more better trained and adaptable workers. If you are job hunting, you

need to be able to jump back into the workplace with marketable skills employers want. Important ones to perfect are technical and computer skills, good writing and public speaking, leadership, sales, negotiations and managing budgets, are particularly valued.

### Did you advance your technical competence?

Employers want you to improve your job knowledge. To do so, take courses in your field offered by associations, colleges, and e-learning training programs. Read trade journals, stay up on trends, industry changes, and advances. Doing so makes you a more desirable employee to retain or hire. Join a professional organization. They provide needed education and resources to keep you current in your field. Through active participation you'll develop an important network of contacts. These people can become mini-mentors, offering guidance when you face work problems, share new ideas and advice helping you to perform better on the job.

### Are you ready when opportunity knocks?

Is your resume updated so you can send it on in a minute's notice? HR Manager Melinda Combs, who's hired hundreds of professionals, revealed HR offices sort resumes with a quick 15 seconds glance to determine if they should take a closer look, and eliminate 80 percent or more. Résumés get noticed when you describe specific results and accomplishments. Note what you have increased or decreased how you saved money and contributed to productivity and the bottom-line. By adding a "Summary of Qualifications" section with five to six sentences highlights your experience and top selling points to do the job, you will stand out.

Safeguard your future by planning out your professional goals for the next year - today. ❖

## New Membership Recruitment Contest

The Baltimore Chapter of the AGA has an ongoing contest until April 30, 2007. Six individuals who sponsor the most new members into the Baltimore Chapter from September 1, 2006 through April 30, 2007 will receive a \$100 savings bond.

**The sponsor's name must be on the new member's AGA application to qualify.** Questions can be directed to Ed Koontz on 410-965-7445 or Dellareese Morton-Smith on 410-966-6548. ❖



### **The Mark of Excellence in Government Financial Management**

Become a **Certified Government Financial Manager**. Visit AGA's website at [www.agacgfm.org](http://www.agacgfm.org) to start on the pathway to CGFM certification.

## Intensive CGFM Review Course - Don't Miss This Opportunity to Take the CGFM Exams

Have you applied for the CGFM Program, but are having difficulty committing time to study and take the exams? Would you like to save on exam fees?

Then consider AGA's Intensive Review Course! Already a staple at two of AGA's conferences, it was just offered before the National Leadership Conference (NLC) in Washington DC and once again was sold out.

After attending the two-day review course on February 9-10, the candidates tackled the CGFM Examinations over the next two days (with some taking all three exams in one day!). As a result, 19 of the participants passed all three (or finished up their remaining) CGFM Examinations at this event. Several others passed one or two examinations and are on their way to completing the CGFM process.

While this "intense" experience is not for everybody, participants were attracted to the idea of completing the CGFM process in a short period of time, having a set deadline to take the examinations and saving money (the cost of CGFM Examinations is included in the Intensive Review Course fee and this fee is less than the cost of the three examinations). Holding an Intensive Review Course and CGFM Examinations in conjunction with AGA National Leadership and

Professional Development Conferences gives the candidates one more way to reinforce the material and take the CGFM Examinations (candidates can also take the exams at Prometric testing centers anytime).

The extra reinforcement of the material is exactly what some people wanted and needed. The Intensive Review Course is not a substitute for the six days of regular instructor-led training courses. On the contrary, this course is designed as a supplement to previous preparation for the CGFM Examinations. In fact, the majority of the participants have either attended the CGFM training courses or purchased the CGFM study guides before participating in the Intensive Review Course.

AGA plans to continue offering this course and CGFM Examinations at its upcoming conferences. The next Intensive Review Course is scheduled for June 21-22, 2007 (with exams on June 23-24, 2007) in conjunction with AGA's Professional Development Conference (PDC) in Nashville, TN.

To register for the review course, visit the following site- [http://www.agacgfm.org/pdc2007/cgfm\\_exam.htm](http://www.agacgfm.org/pdc2007/cgfm_exam.htm). Space is limited - if you are interested in participating, sign up now! ❖

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## Federal Financial Management Conference

Tuesday, March 13, 2007 - \$150 per participant - 7 CPEs - The Renaissance Washington DC Hotel



- ✓ Opening Address by Linda M. Combs, Controller, Office of Management and Budget
- ✓ Presentation of the Donald L. Scantlebury Memorial A Awards by the JFMIP Principals
- ✓ Keynote Speakers:
  - Clay Johnson III, Deputy Director for Management, OMB
  - David M. Walker, Comptroller General of the United States
  - Linda M. Springer, Director, Office of Personnel Management
- ✓ Panel Sessions on Current Financial Management Issues:
  - The New Yellow Book: Achieving World Class Government Audits
  - Connecting Budgeting and Accounting
  - Challenges of Obtaining and Maintaining Clean Opinions
  - Internal Controls—Making a Difference
  - Federal Accounting Standards and Next Generation Reporting
  - Financial Management Line of Business

For more information, visit [http://www.fsio.gov/fsio/fsio\\_conference\\_2007/conference\\_home\\_07.shtml](http://www.fsio.gov/fsio/fsio_conference_2007/conference_home_07.shtml)❖

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To all of the members who submit articles for the monthly Newsletter, we say Thank you! For **April 2007**, please make any submissions by **March 19, 2007** by contacting the Editorial Committee.

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