

# INTRODUCTORY TRIBAL FINANCE AND ACCOUNTING CERTIFICATE PROGRAM

WES WATKINS CENTER, OSU, STILLWATER, OK

## TUESDAY, NOVEMBER 27

7:30-8:30 a.m.	<b>REGISTRATION: OUTSIDE OF ROOM 108</b>	<b>HOURS</b>	<b>THEME</b>	<b>CPE</b>
8:00-8:30 a.m. Room 108	<b>PROGRAM WELCOME</b> by Dean Ken Eastman, Spears School of Business Facilitator: Rachel Domnick, Instructor of Professional Practice, School of Accounting, Oklahoma State University, Stillwater, OK	0.5		
8:30 - 10:15 a.m. Room 108	<b>INTRODUCTION TO FEDERAL INDIAN LAW</b> Speaker: Alison Grigonis, Senior Attorney, Dorsey & Whitney, LLP, Costa Mesa, CA	1.75	Introduction to Tribal Finance and Accounting	Technical, Business Law
10:15 - 10:30 a.m.	<b>BREAK</b>			
10:30 a.m. - 11:30 a.m. Room 108	<b>INTRODUCTION TO FEDERAL INDIAN LAW (CONTINUED)</b> Speaker: Alison Grigonis, Senior Attorney, Dorsey & Whitney, LLP, Costa Mesa, CA	1	Introduction to Tribal Finance and Accounting	Technical, Business Law
11:30 a.m. - 12:15 p.m.	<b>LUNCH: REMARKS BY JENNIFER PARI SIEN, NAFOA – ORANGE BOOK: ROOM 101</b>			
12:15 - 2:15 p.m. Room 108	<b>INTRODUCTION TO TRIBAL GOVERNMENT ACCOUNTING AND FINANCE</b> Speaker: Joel Haaser, Managing Director, BKD CPA and Advisors, Tulsa, OK	2	Introduction to Tribal Finance and Accounting	Technical, Accounting (Governmental)
2:15 - 3:15 p.m. Room 108	<b>BEST ADMINISTRATIVE GRANT PRACTICES AND COMPLIANCE FROM TRIBES</b> Speaker: James Nichols, Senior Attorney, Dorsey & Whitney, LLP, Minneapolis, MN Alex Hontos, Partner, Dorsey & Whitney, LLP, Minneapolis, MN	1	Grants and Compliance	Technical, Accounting
3:15 - 3:30 p.m.	<b>BREAK</b>			
3:30 - 5:30 p.m. Room 108	<b>INTERNAL CONTROLS &amp; COMPLIANCE, FRAUD PROTECTION</b> Speaker: Joel Haaser, Managing Director, BKD CPAs & Advisors, Tulsa, OK	2	Safeguarding the Tribe	Technical, Accounting
7:30-10 p.m.	<b>HOSPITALITY SUITE–ATHERTON HOTEL</b>			

## WEDNESDAY, NOVEMBER 28

		<b>HOURS</b>	<b>THEME</b>	<b>CPE</b>
8:00 - 10:00 a.m. Room 108	<b>OVERVIEW OF GOVERNMENT ACCOUNTING</b> Speaker: Michael Madsen, Senior Manager, BKD CPAs & Advisors, Tulsa, OK	2	Introduction to Tribal Finance and Accounting	Technical, Accounting (Governmental)
10:00 - 10:15 a.m.	<b>BREAK</b>			
10:15 a.m. - 12:15 p.m. Room 108	<b>AUDITING PROCESSES AND REGULATIONS/PREPARING FOR AN AUDIT</b> Speaker: Patty Wetz, CPA, Senior Manager, Baker Tilly Virchow Krause, LLP, Austin, TX	2	Safeguarding the Tribe	Technical, Auditing
12:15 - 1:15 p.m.	<b>LUNCH: WELCOME BY PROVOST GARY SANDEFUR, OKLAHOMA STATE UNIVERSITY: ROOM 101</b>			
1:15 - 3:15 p.m. Room 108	<b>IMPORTANCE OF FINANCE AND OVERVIEW OF TRIBAL FINANCIAL STATEMENTS</b> Speaker: Patty Wetz, CPA, Senior Manager, Baker Tilly Virchow Krause, LLP, Austin, TX	2.5	Introduction to Tribal Finance and Accounting	Technical, Finance
3:15 - 3:30 p.m.	<b>BREAK</b>			
3:30 - 5:30 p.m. Room 108	<b>EFFECTIVE RECORD KEEPING AT YOUR TRIBE</b> Speaker: Corrine Wilson, CPA, Principal, REDW, Phoenix, AZ	1	Grants and Compliance	Technical, Accounting
7:30-10 p.m.	<b>HOSPITALITY SUITE–ATHERTON HOTEL</b>			



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## THURSDAY, NOVEMBER 29

		HOURS	THEME	CPE
8:00 - 10:00 a.m. Room 108	<b>IRS TRIBAL GOVERNMENT TAX GUIDE</b> Speaker: Corrine Wilson, CPA, Principal, REDW, Phoenix, AZ	2	Safeguarding the Tribe	Technical, Accounting (Governmental)
10:00 - 10:15 a.m.	<b>BREAK</b>			
10:15 - 11:45 a.m. Room 108	<b>COST PRINCIPLES FOR TRIBES</b> Speaker: Corrine Wilson, CPA, Principal, REDW, Phoenix, AZ	1.5	Grants and Compliance	Technical, Accounting
11:45 a.m. - 12:45 p.m.	<b>LUNCH: ROOM 101</b>			
12:45 - 3:00 p.m. Room 108	<b>FEDERAL GENERAL UNIFORM ADMINISTRATIVE REQUIREMENTS</b> Speaker: Corrine Wilson, CPA, Principal, REDW, Phoenix, AZ	2.25	Grants and Compliance	Technical, Accounting
3:00 - 3:15 p.m.	<b>BREAK</b>			
3:15 - 4:00 p.m. Room 108	<b>CLOSING OUT GRANTS</b> Speaker: Corrine Wilson, CPA, Principal, REDW, Phoenix, AZ	.75	Safeguarding the Tribe	Technical, Accounting (Governmental)
4:00 - 6:00 p.m. Room 108	<b>ETHICS FOR ACCOUNTING AND FINANCE PROFESSIONALS</b> Speaker: Rachel Cox, MS, CPA, Instructor of Professional Practice, School of Accounting, Oklahoma State University, Stillwater, OK	2	Safeguarding the Tribe	Non-Technical, Ethics
7:30-10 p.m.	<b>HOSPITALITY SUITE-ATHERTON HOTEL</b>			

## FRIDAY, NOVEMBER 30

		HOURS	THEME	CPE
8:00 - 10:00 a.m. Room 108	<b>INDIRECT COST RATE CALCULATION AND NEGOTIATION PROCESS</b> Speaker: Scott Huebert, Partner, Finley & Cook, Shawnee, OK	2	Grants and Compliance	Technical, Accounting
10:00 - 10:15 a.m.	<b>BREAK</b>			
10:15 - 11:15 a.m. Room 108	<b>SEFA - SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS</b> Speaker: Becky Carter, Accounting Manager, Finley & Cook, Shawnee, OK	1	Grants and Compliance	Technical, Auditing
11:15 a.m. - 12:15 p.m. Room 108	<b>PREPARING BUDGETS</b> Speaker: Victor Flores, MBA, MHA, President, Oklahoma Tribal Finance Consortium, Shawnee, OK	1	Essential Topics	Technical, Accounting
12:15 - 12:30 p.m. Room 108	<b>SUMMARY - ROUND TABLE EXERCISE AND FINAL QUESTIONS ROOM 108</b>	.25		
12:30 - 1:30 p.m.	<b>LUNCH &amp; CERTIFICATE PRESENTATION: ROOM 101</b>			