

AWARD WINNING*

INTRODUCTORY TRIBAL FINANCE AND ACCOUNTING

CERTIFICATE PROGRAM

May 18-21, 2021



The OSU Introductory Tribal Finance and Accounting Institute (52 total hours) consists of:

- Two certificate programs to be completed in a 2 year time frame:
 - ◆ Introductory Tribal Finance and Accounting Certificate Program
 - 3 ½ day program (28 hours)
 - Gain knowledge and experience to help you become a more effective tribal finance/accounting professional and leader
 - Interact with and learn from other tribal finance/accounting professionals throughout the state and beyond
 - ◆ Tribal Leadership Certificate Program
 - 8 three-hour sessions (24 hours)
 - Gain a deeper understanding of issues affecting organizations with a goal of ultimately becoming more effective in the workplace and driving progress in your career

Who should attend:

- Entry level employees in tribal financial positions
- Professionals who need to acquire increased knowledge regarding tribal finance and accounting (i.e. accountants, lawyers, bankers, etc.)
- Elected tribal officials and leaders who wish to better understand the financial side of a business decision

For those who graduate from the Introductory Tribal Finance and Accounting Institute, you may wish to take seminars for further advancement and register in the Intermediate Tribal Finance and Accounting Academy.

OSU Tribal Finance and Accounting Institute/Academy Options (in order):

- Introductory Tribal Finance and Accounting Institute
- Intermediate Tribal Finance and Accounting Academy

*Winner of the 2019 University Professional and Continuing Education Association (UPCEA) Central Region Outstanding Noncredit Program Award, the 2020 UPCEA National Outstanding Noncredit Program Award, and the 2019 Conference on Management and Executive Development (CMED) Peer Choice Best Custom Program Award.

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TUESDAY, MAY 18

7:30-8:00 a.m.	REGISTRATION	HOURS	THEME	CPE
8:00-8:15 a.m.	PROGRAM WELCOME Facilitator: Rachel Domnick, Instructor of Professional Practice, School of Accounting, Spears School of Business, Oklahoma State University, Stillwater, OK	0.25		
8:15 - 9:45 a.m.	OKLAHOMA LEGAL DISTINCTIONS Speaker: Wilda Wahpepah, Special Counsel, Sheppard Mullin, Washington, DC	1.5	Introduction to Tribal Law	Technical, Business Law
9:45 - 10:00 a.m.	BREAK			
10:00 a.m. - 12:00 p.m.	ETHICS FOR ACCOUNTING AND FINANCE PROFESSIONALS Speaker: Rachel Cox, MS, CPA, Clinical Faculty, School of Accounting, Oklahoma State University, Stillwater, OK	2	Safeguarding the Tribe	Non-Technical, Ethics
12:00 - 1:00 p.m.	LUNCH			
1:00 - 2:30 p.m.	INTRODUCTION TO TRIBAL GOVERNMENT ACCOUNTING & FINANCE Speaker: Joel Haaser, Managing Director, BKD, LLP, Tulsa, OK	1.5	Introduction to Tribal Finance and Accounting	Technical, Accounting (Governmental)
2:30 - 3:00 p.m.	INTERNAL CONTROLS & COMPLIANCE, FRAUD PROTECTION Speaker: Joel Haaser, Managing Director, BKD, LLP, Tulsa, OK	.5	Safeguarding the Tribe	Technical, Accounting
3:00 - 3:15 p.m.	BREAK			
3:15 - 4:45 p.m.	INTERNAL CONTROLS & COMPLIANCE, FRAUD PROTECTION (CONTINUED) Speaker: Joel Haaser, Managing Director, BKD, LLP, Tulsa, OK	1.5	Safeguarding the Tribe	Technical, Accounting
4:45 - 5:45 p.m.	PREPARING BUDGETS Speaker: Rachel Domnick, Instructor of Professional Practice, School of Accounting, Spears School of Business, Oklahoma State University, Stillwater, OK	1	Essential Topics	Technical, Accounting
7:30 - 10:00 p.m.	HOSPITALITY SUITE—ATHERTON HOTEL			

WEDNESDAY, MAY 19

		HOURS	THEME	CPE
8:00 - 9:30 a.m.	OVERVIEW OF GOVERNMENT ACCOUNTING Speaker: Michael Madsen, Senior Manager, BKD, LLP, Tulsa, OK	1.5	Introduction to Tribal Finance and Accounting	Technical, Accounting (Governmental)
9:30 - 9:45 a.m.	BREAK			
9:45 - 10:15 a.m.	OVERVIEW OF GOVERNMENT ACCOUNTING (CONTINUED) Speaker: Michael Madsen, Senior Manager, BKD, LLP, Tulsa, OK	.5	Introduction to Tribal Finance and Accounting	Technical, Accounting (Governmental)
10:15 - 11:15 a.m.	AUDITING PROCESSES AND REGULATIONS/PREPARING FOR AN AUDIT Speaker: Patty Wetz, CPA, Senior Manager, Baker Tilley Virchow Krause, LLP, Austin, TX	1	Safeguarding the Tribe	Technical, Accounting (Governmental)
11:15 - 11:30 a.m.	BREAK			
11:30 a.m. - 12:30 p.m.	AUDITING PROCESSES AND REGULATIONS/PREPARING FOR AN AUDIT (CONTINUED) Speaker: Patty Wetz, CPA, Senior Manager, Baker Tilley Virchow Krause, LLP, Austin, TX	1	Safeguarding the Tribe	Technical, Accounting (Governmental)
12:30 - 1:30 p.m.	LUNCH			



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WEDNESDAY, MAY 19 continued

1:30 - 3:00 p.m.	IMPORTANCE OF FINANCE AND OVERVIEW OF TRIBAL FINANCIAL STATEMENTS Speaker: Patty Weitz, CPA, Senior Manager, Baker Tilley Virchow Krause, LLP, Austin, TX	1.5	Introduction to Tribal Finance and Accounting	Technical, Finance
3:00 - 3:15 p.m.	BREAK			
3:15 - 4:15 p.m.	IMPORTANCE OF FINANCE AND OVERVIEW OF TRIBAL FINANCIAL STATEMENTS (CONTINUED) Speaker: Patty Weitz, CPA, Senior Manager, Baker Tilley Virchow Krause, LLP, Austin, TX	1	Introduction to Tribal Finance and Accounting	Technical, Finance
4:15 - 5:15 p.m.	EFFECTIVE RECORD KEEPING AT YOUR TRIBE Speaker: Corrine Wilson, CPA, Principal, REDW, Phoenix, AZ	1	Grants and Compliance	Technical, Accounting
7:30-10:00 p.m.	HOSPITALITY SUITE--ATHERTON HOTEL			

THURSDAY, MAY 20

		HOURS	THEME	CPE
8:00 - 10:00 a.m.	IRS TRIBAL GOVERNMENT TAX GUIDE Speaker: Corrine Wilson, CPA, Principal, REDW, Phoenix, AZ	2	Safeguarding the Tribe	Technical, Accounting (Governmental)
10:00 - 10:15 a.m.	BREAK			
10:15 - 11:45 a.m.	COST PRINCIPLES FOR TRIBES Speaker: Corrine Wilson, CPA, Principal, REDW, Phoenix, AZ	1.5	Grants and Compliance	Technical, Accounting
11:45 a.m. - 12:45 p.m.	LUNCH			
12:45 - 3:00 p.m.	FEDERAL GENERAL UNIFORM ADMINISTRATIVE REQUIREMENTS Speaker: Corrine Wilson, CPA, Principal, REDW, Phoenix, AZ	2.25	Grants and Compliance	Technical, Accounting
3:00 - 3:15 p.m.	BREAK			
3:15 - 4:00 p.m.	CLOSING OUT GRANTS Speaker: Corrine Wilson, CPA, Principal, REDW, Phoenix, AZ	.75	Safeguarding the Tribe	Technical, Accounting (Governmental)
4:00 - 5:45 p.m.	INTRODUCTION TO FEDERAL INDIAN LAW Speaker: James Nichols, Senior Attorney, Dorsey & Whitney, LLP, Minneapolis, MN	1.75	Introduction to Tribal Law	Technical, Business Law
7:30-10:00 p.m.	HOSPITALITY SUITE--ATHERTON HOTEL			

FRIDAY, MAY 21

		HOURS	THEME	CPE
8:00 - 9:00 a.m.	BEST ADMINISTRATIVE GRANT PRACTICES AND COMPLIANCE FROM TRIBES Speaker: Alex Hontos, Partner, Dorsey & Whitney, LLP, Minneapolis, MN	1	Grants and Compliance	Technical, Accounting
9:00 - 9:30 a.m.	INDIRECT COST RATE CALCULATION AND NEGOTIATION PROCESS Speaker: Scott Huebert, Partner, Finley & Cook, Shawnee, OK	.5	Grants and Compliance	Technical, Accounting
9:30 - 9:45 a.m.	BREAK			
9:45 - 11:15 a.m.	INDIRECT COST RATE CALCULATION AND NEGOTIATION PROCESS (CONTINUED) Speaker: Scott Huebert, Partner, Finley & Cook, Shawnee, OK	1.5	Grants and Compliance	Technical, Accounting
11:15 - 11:30 a.m.	BREAK			
11:30 a.m. - 12:30 p.m.	SEFA - SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS Speaker: Becky Carter, Accounting Manager, Finley & Cook, Shawnee, OK	1	Grants and Compliance	Technical, Auditing
12:30 - 1:30 p.m.	LUNCH AND CERTIFICATE PRESENTATION			

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DIGITAL BADGE* INTRODUCTORY ACCOUNTING AND FINANCE CERTIFICATE PROGRAM

*As a participant of this program, you will also be eligible to receive a Digital Badge. Program completion is required in order to receive the OSU Introductory Finance and Accounting Digital Badge that can be added to your portfolio. The badge will note the sessions covered and will serve as a validation of accomplishments, skills, and quality you have learned throughout this program.

IN ORDER TO RECEIVE A CERTIFICATE OF COMPLETION, THE PARTICIPANT MUST ATTEND AT LEAST 90% OF THE PROGRAM

OSUSPEARS SCHOOL TRIBAL FINANCE AND ACCOUNTING ADVISORY BOARD:

Patty Wetz/Baker Tilly

Jay Hannah/ BancFirst

Joel Haaser/BKD

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OSU Representatives/Holly Bergbower, Rachel
Domnick, Ken Eastman, Audrey Gramling, Lindsey
Ray, George Krull, Betty Simkins, Julie Weathers



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May 18-21, 2021

Wes Watkins Center | Oklahoma State University | Stillwater, OK

<https://business.okstate.edu/cepd/open-enrollment/pds/tribal-finance-and-accounting-institute.html>

Name: _____

Title: _____

Company/Affiliation: _____

Address: _____

City: _____ State: _____ Zip: _____

Email: _____ Phone: _____

Number of years in current position _____ yrs.

Number of years at your current organization _____ yrs.

\$1,700 (NAFOA Member)

\$1,850 (Non-member)

(Registration includes instruction, materials, breakfast lunches, receptions, refreshments, and certificates/certificate holders.) One copy of the Financial Reporting and Information Guide for Tribal Governments and Their Enterprises (Orange Book) as published by the Native American Financial Officers Association will be distributed as part of the registration fee to each participant.

\$75 Yes, I would like to enroll in the OSU Introductory Tribal Finance and Accounting Institute.

I understand there is a one-time application fee of \$75. By enrolling in the Institute, I will plan to complete 52 total hours of education in business topics—Tribal Leadership Certificate Program (8 three-hour sessions) and one 3 ½ day program (Tribal Finance and Accounting Certificate Program) over a two-year period.

Payment Information:

A check payable to Oklahoma State University is enclosed for the amount of \$ _____.

If paying by credit card, please fax registration form to 405-744-6143 or call 405-744-5208.

Charge \$ _____ to my Visa MasterCard American Express

Card No. _____ Exp. Date: _____

Security Code: _____ Billing Zip Code: _____

The Center for Executive and Professional Development, Oklahoma State University, is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

Please mail this registration form and check to:

Center for Executive and Professional Development
Spears School of Business | Oklahoma State University
294 Business Building
Stillwater, OK 74078-4011

Cancellation Policy:

Because of guarantee requirements for meal functions, cancellations must be received within 10 business days prior to the event. No refunds will be given after this time.

Hotel Accommodations:

Please note that OSU is a tobacco-free campus. Participants are asked to make their own hotel reservations. Rooms have been blocked at the hotels listed below. (Group code: OSU Tribal Finance)

Atherton	103 Student Union	405-744-6835
Best Western Plus Cimarron Hotel & Suites	315 N. Husband Street	405-372-2878

Call: 405-744-5208 | Fax: 405-744-6143 | E-mail: cepd@okstate.edu | Web: cepd.okstate.edu



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Spears School of Business

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