



**2019 Clerks, Treasurers & Finance Officers
Institute Registration Form**
Lismore Hotel, Eau Claire
June 5-7, 2019

Registration Deadline: May 29, 2019

Thank you to our sponsors!
Johnson Block & Company, Inc. • League Mutual Insurance • MPIC

Name _____ Title _____
Municipality/Company _____
Street Address _____ City _____ State _____ Zip _____
Phone number _____ email _____

WORKSHOP CHOICES: (Please choose one from each set of Thursday sessions.)

8:30 a.m.

Track 1 Census/
Redistricting

Track 2 GASB Updates

10:15 a.m.

Track 1 Responding to
Public Records Requests

Track 2 Levy Limits &
Expenditure Restraint

1:00 p.m.

Track 1 Election Updates

Track 2 Investing in Changing
Rate Environment

2:45 p.m.

Track 1 Local Government
Ethics & Campaign Finance

Track 2 Debt Management &
Rating Considerations

Do you need amended arrangements to accommodate a disability or dietary need? No. Yes.

If yes, we will contact you to make the necessary arrangements.

Are you bringing a guest? No. Yes. Guest's name _____

Attending Wednesday's Picnic? I will attend. My guest and I will attend. Can't make it.

REGISTRATION FEES:

Tuition for Members \$125 Tuition for Non-Members \$150 Guest Picnic Fee \$30 TOTAL \$ _____

I am paying by CHECK. (Make check payable to: League of Wisconsin Municipalities)

I am paying by Credit Card: Visa MasterCard

Card Number _____

Expiration Date _____ Security Code (back of card) _____

Signature _____

CONFERENCE HOTEL INFORMATION:

Make reservations directly with **Lismore Hotel** at 715-835-8888. \$82/single or double.

Identify yourself as part of the Clerks, Treasurers & Finance Officers Institute, Booking ID LOM, to receive the block room rate.

Deadline for room reservations at the block rate is May 15, 2019, or until group block is sold out, whichever comes first.

Reservations cancelled 48 hours in advance of arrival will receive a refund. Room charges are subject to a 13.5% local and state taxes; a letter/certificate of exemption must be presented if the charge should be tax exempt.

THE FINE PRINT:

Only staff members and officials from cities and villages that are currently members of the League of Wisconsin Municipalities may register as members. Registration fees, minus a \$10 processing fee, are refundable if received by May 29, 2019. No refunds will be issued for cancellations received after close of business May 29, 2019.

Online Registration: www.lwm-info.org

Fax: 608-267-0645

Questions? Call 608-267-2380

Mail: League of Wisconsin Municipalities

131 West Wilson Street, Suite 505

Madison, WI 53703

Agenda

Wednesday, June 5

- 11:30 A.M. Registration Opens
General Session
Presiding: Sandi Wesolowski, City Clerk, Franklin, President, Clerks, Treasurers & Finance Officers
- 1:30 P.M. **Welcome**
Dale Peters, City Manager, Eau Claire
- 1:45 P.M. **Department of Revenue Update**
Moderator: Steve DeQuaker, Finance Director/Treasurer, Burlington; *Speaker:* Valeah Foy, Director, Local Government Services, Department of Revenue
- 2:30 - 2:45 P.M. **Break**
- 2:45 - 4:00 P.M. **Legislative Update**
Moderator: Sandi Wesolowski, City Clerk, Franklin; *Speaker:* Curt Witynski, Deputy Director, League of Wisconsin Municipalities
- 5:00 - 7:00 P.M. **Networking Hour & Picnic**
Dinner will be served at 5:30 P.M.

Thursday, June 6 – Concurrent Sessions

- 8:00 a.m. **Light Breakfast (protein, fruit, coffee)**
- 8:30 - 10:00 A.M. **1) 2020 Census & Redistricting: Implications for Local Clerks**
Moderator: Kelly Tarczewski, Clerk/Treasurer Pewaukee; *Speaker:* Dan Veroff, Demographic Specialist, University of Wisconsin
- 2) GASB Updates (Leases & Post-Employment)**
Moderator: Ralph Chipman, Finance Director, New Berlin; *Speaker:* Kim Shult, Partner, CPA, Baker Tilly Virchow Krause, LLP
- 10:00 - 10:15 A.M. **Break**
- 10:15 - 11:45 A.M. **1) Responding to Public Records Requests**
Moderator: Deb Hall, Clerk, Marshfield; *Speaker:* Paul Ferguson, Assistant Attorney General, Department of Justice
- 2) Levy Limits & Expenditure Restraint**
Moderator: Amy Barnes, Clerk/Treasurer, Village of Blanchardville; *Speakers:* Greg Johnson, Senior Municipal Advisor, Ehlers, and David Ferris, Municipal Advisor, Ehlers
- 12:00 P.M. **Business Meeting/Lunch**
- 1:00 - 2:30 P.M. **1) Election Updates**
Moderator: Steve Braatz, Jr., City Clerk, West Allis; *Speakers:* Wisconsin Elections Commission Staff
- 2) Investing in a Changing Rate Environment**
Moderator: Dave Kurihara, Clerk/Treasurer, Lancaster; *Speakers:* Sara Schnoor, AVP, WI Investment Solutions, PMA Financial Network & Jeannette Parr, Senior Portfolio Manager, Prudent Man Advisors
- 2:30 - 2:45 P.M. **Break**
- 2:45 - 4:15 P.M. **1) Local Government Ethics & Campaign Finance**
Moderator: Myra Piergrossi, Finance Director, Fox Crossing; *Speaker:* Daniel A. Carlton, Jr. Administrator, WI Ethics Commission
- 2) Debt Management & Rating Considerations**
Moderator: Dave Kurihara, Clerk/Treasurer, Lancaster; *Speakers:* Michele Wiberg, Managing Director, Brian Della, Director, PMA Securities & Jenny Bernhardt, Analyst, Moody's Investors Service

Friday, June 7

- 8:00 A.M. **Light Breakfast (protein, fruit, coffee)**
- 9:00 A.M. **Using Barn Lime & Bailer Twine to Live Life with Purpose**
Moderator: Amy Barnes, Clerk/Treasurer, Village of Blanchardville; *Speaker:* Laura Daniels, Heartwood Dairy
- 10:15 A.M. **Break**
- 10:30 A.M. **Using Barn Lime & Bailer Twine to Live Life with Purpose (continued)**
Moderator: Amy Barnes, Clerk/Treasurer, Village of Blanchardville; *Speaker:* Laura Daniels, Heartwood Dairy
- 11:45 A.M. **Adjournment**

Wednesday Picnic
is included in the guest program.

Suggestions for local area points of interest will be provided at registration, but there is no formal guest tour or programming.

Committee Officers
Clerks, Treasurers & Finance Officers Institute

President
Sandi Wesolowski
City Clerk
Franklin (CL)

1st Vice President
Steve Braatz, Jr.
City Clerk
West Allis (CL)

2nd Vice President
Ralph Chipman
City Finance Director
New Berlin (FD)

Secretary
Kelly Tarczewski
City Clerk/Treasurer
Pewaukee (CL)

Treasurer
Deb Hall
City Clerk
Marshfield (CL)

Trustee
Dave Kurihara
City Clerk/Treasurer
Lancaster (TR)

Trustee
Myra Piergrossi
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Clerk/Treasurer
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Finance Director/Treasurer
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Thank you to our sponsors!