



**STATE OF INDIANA**  
AN EQUAL OPPORTUNITY EMPLOYER

STATE BOARD OF ACCOUNTS  
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**AGENDA**  
**STATE BOARD OF ACCOUNTS**  
**COUNTY TREASURERS STATE CALLED CONFERENCE**  
**SHERATON, KEYSTONE CROSSING – INDIANPOLIS, IN**  
**AUGUST 2, 3, and 4, 2017**

**WEDNESDAY, AUGUST 2nd**

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|----------|--|
| 8:00 AM  | Registration   |
| 9:00 AM  | Welcome, Introduction, Remarks and Announcements<br>Paul Joyce, CPA, State Examiner<br>Mike Bozymski, CPA, Deputy State Examiner<br>Tammy White, CPA, Deputy State Examiner<br>State Board of Accounts<br>Honorable Tera Klutz, CPA<br>Auditor of State<br>David Bottorff, Executive Director<br>Association of Indiana Counties<br>Paula Stewart, Lawrence County Treasurer<br>President of Indiana County Treasurers Association |
| 9:45 AM  | Honorable Kelly Mitchell<br>Treasurer of State   |
| 10:00 AM | Sovereign Citizen Extremism<br>Tom Arvin, Indiana State Police<br>Jane Peoples, Indiana State Police – Capital Section<br>Matthew Stevenson, Indianapolis Metropolitan Police Department<br>Mike Hubbs, Marion County<br>Sofia Kish, Federal Bureau of Investigations<br>SCE Working Group   |
| 10:30 AM | BREAK  |
| 10:50 AM | Sovereign Citizen Extremism ( <i>Continued</i> )   |
| 12:00 PM | ADJOURN FOR LUNCH  |
| 1:30 PM  | Banking and Investments and the Indiana Code<br>Mike Frick, Chief Deputy Treasurer and Portfolio Manager<br>Kim Logan, Deputy Treasurer and Director of Operations<br>Cindy Barger, Director of TrustIndiana<br>Treasurer of State   |
| 2:30 PM  | BREAK  |
| 2:50 PM  | Investments from a Treasurer's Perspective<br>Pia O'Connor, CPA, MBA, County Treasurer<br>Bartholomew County   |
| 3:50 PM  | ADJOURN  |

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**AUGUST 3, 4, and 5, 2016**  
**(CONTINUED)**

**THURSDAY, AUGUST 3rd**

- 8:00 AM Registration
- 9:00 AM New Legislation  
Lori Rogers, CPA, Director of County Services  
State Board of Accounts
- 10:00 AM DLGF Updates  
Matthew Parkinson, CPA, Deputy Commissioner – Operations and Finance  
Fred Van Dorp, Budget Director  
Department of Local Government Finance
- 10:30 AM BREAK
- 10:50 AM Settlement  
John Etnier, Settlement Analyst  
Auditor of State
- 11:50 AM ADJOURN FOR LUNCH
- 1:20 PM Innkeeper's Tax  
Carrie Lambert, Executive Director  
Indiana Tourism Association  
Jaime Bohler Smith, Executive Director  
Visit Hendricks County
- 2:05 PM Cashbook  
Shannon Lopez, CPA, Director of County Services  
State Board of Accounts
- 2:35 PM BREAK
- 2:55 PM House Bill 1031 and Website  
Tyler Michael, Director of Communications  
State Board of Accounts
- 3:40 PM Sur and Wheel Tax  
Shannon Lopez, CPA, Director of County Services  
State Board of Accounts
- 4:00 PM ADJOURN

**FRIDAY, AUGUST 4th**

- 8:00 AM Registration
- 9:00 AM Question and Answer Session  
Shannon Lopez, CPA, Director of County Services  
Lori Rogers, CPA, Director of County Services  
State Board of Accounts
- 10:00 AM Association Business Meeting and Legislative Report
- 12:00 AM Adjournment of the State Board of Accounts Called Meeting