

LFMA 2023 AGENDA

Wednesday, March 29th

6:30 – 9:30 p.m.

Welcome Reception and Games: *Hydrangea Patio*

Stop by to reconnect with familiar faces and meet others while you enjoy drinks, hors d'oeuvres and the fellowship of your peers. Entertainment will be provided.

Thursday, March 30th *All sessions will be held in Palm A, B, & C.*

8:00 – 8:30 a.m.

Announcements and Devotion

8:30 – 9:30 a.m.

Economic Update: *Matt Haggerty, RSM*

Join this session to discuss global macro and micro market economic trends. Hear about trends such as population growth, demographic changes, investment landscape, and Federal Reserve policy changes.

9:30 – 10:30 a.m.

Nonprofit Accounting Updates: *Tom Sneeringer, RSM*

Join Tom as he shares important accounting updates – including the latest updates on FASB requirements and lease accounting standards.

10:30 – 10:45 a.m.

Break: *Palm Foyer*

10:45 a.m. – 12:00 p.m.

Retirement Ready?: Legislative Updates and Plan Insights for Faith-based Nonprofits *Jewelie Grape, Esq., J. Grape Law; Hosted by Portico*

Join us in a discussion about employer sponsored retirement solutions including the benefits of a church plan and up-to-date plan design considerations. Jewelie Grape, ERISA & employee benefits attorney, will share best practices financial managers should consider related to employer sponsored retirement plans. Jewelie will review key provisions of SECURE 2.0, major retirement plan legislation signed into law on December 29, 2022. She will also cover several solutions available specifically for faith-based non-profits. Portico Benefit Services will share insights from their work with LSA organizations to provide a best-in-class retirement plan that focuses on financial wellness, strong governance, and investment manager oversight.

12:00 p.m. – 1:30 p.m.

Networking Lunch: *Palm D, E, & F*

1:30 p.m. – 2:30 p.m.

Technology Trends for Nonprofits *Michelle Juliana, Matt Haggerty, Tom Eastlake, RSM*

What is the future of technology for nonprofit finance departments? A look at ERPs, reporting, forecasting, and data analytics.

2:30 – 3:30 p.m.

What is DEI and Why Does It Matter? *Nancy Sung Shelton, LSF*

This presentation will explore the critical elements and considerations of diversity, equity, and inclusion (DEI) as an organizational imperative. Through open dialogue and activities, participant will dive deeper into cultural attributes of those being served internally (staff) and externally (clients and community at-large) by the organization to better connect their realities with decisions being made on their behalf.

3:30 – 3:45 p.m.

Break: *Palm Foyer*

3:45 – 4:45 p.m.

Future of Payments: *Nick Ferrer, Ameris Bank*

Where is the world moving to in terms of payments to vendors, employees, and others?

Evening

Dinner on Your Own/Group

For those that would like to dine together, we will coordinate where and when to meet.

Friday, March 31st

All sessions will be held in Palm A, B, & C.

8:00 – 8:30 a.m.

Welcome and Devotion

8:30 – 9:30 a.m.

Shift: Listen. Learn. Lead.: *Adam Stanley, Leadercast*

Shifting is a growth engine. As leaders, we must create internal momentum to drag our organizations forward externally. Otherwise, we miss the opportunity that today's culture is providing us. We have to be nimble and willing to change; if we refuse to shift, we end up getting in our own way.

9:30 – 10:30 a.m.

Cybersecurity Trends and Tactics: *Alexandra Bretschneider, JKJ*

Cyber-attacks continue to plague the health and human services industry. The board of directors and regulatory authorities expect your organization to be prepared. Join this session to learn about the latest trends in attacks, key risk management tactics, latest regulatory & insurance changes, and a playbook of incident response.

10:30 – 10:45 a.m.

Break: *Palm Foyer*

10:45 a.m. – Noon

IT Perspective: Connections with Impact *Heidi Leach, Director of IT Project Management, LSSMN*

Are you 'In' with the IT-crowd? Heidi shares how the IT team at LSS of MN transformed an underwhelming project spreadsheet into a practical technology portfolio that the business loves. Learn to create deeper connections with business and IT alignment. Let's expand our network for greatest impact

Noon

Adjourn



Lutheran Financial Managers Association 2023

Hyatt Regency Grand Cypress Orlando

March 29-31, 2023

Thank you to our presenting sponsors:



Alexandra Bretschneider is the Vice President and Cyber Practice Leader at Johnson Kendall and Johnson, a prominent insurance brokerage and risk management firm. After starting at Ernst & Young's IT Advisory practice, Alexandra began consulting in the areas of IT, telecom, and insurance and risk management. She established and oversees the Cyber Risk Management practice at JKJ.

Jewelie Grape is Attorney/Owner at J. Grape Law PLLC. Jewelie provides timely, well-informed, and practical legal solutions to companies and non-profit organizations on matters related to employee benefits, human resources and other important business issues.

Tom Eastlake is Director and Lead Data Architect of Business Intelligence & Data Analytics at RSM US LLP. Tom has operated as a leader, data strategist, and analytics and integration architect throughout his career.

Nick Ferrer has over 18 years of banking experience, 16 of which have been in Treasury Management. He currently serves as Senior Vice President of Ameris Bank as the Treasury Sales Director.

Zach Greenbaum is DYNAMICS D365CE Director at RSM US LLC, has 11 years of experience as a Microsoft Dynamics CRM System Administrator, and is experienced in planning, directing and executing projects, software design, development and testing, and data conversion and validation.

Matt Haggerty is a director in RSM US LLP's Managed Services consulting practice and a senior analyst for the nonprofit and education industry. He has deep experience assisting nonprofit clients with finance and accounting services, aligning their back office to their mission.

Michele Juliana is a Principal in the Business Applications practice at RSM US LLC, a global audit, tax, and consulting firm. Michele is the national leader of Consulting for nonprofit organizations. She has over 20 years of experience in systems implementations, including business process review, discovery, and project management.

Heidi Leach is the Director of IT PMO at LSS of MN, where she connects with business leaders to power their plans with technology initiatives. She turns tech-speak into a familiar language, encouraging informed conversations with decision makers about IT topics.

Tom Sneeringer is a Partner in Audit Services at RSM US LLP, and has over 30 years of audit and accounting experience, specializing in nonprofit organizations.

Communicator, author, and pastor **Andy Stanley** founded Atlanta-based North Point Ministries (NPM) in 1995. Each month, more than 10.5 million of his messages, leadership videos, YouTube videos, and podcasts are accessed online. He is the author of more than 20 books and loves engaging with live audiences

Nancy Sung Shelton, M.A. currently serves as Director- Justice, Equity, Diversity, and Inclusion (JEDI) for Lutheran Services Florida (LSF). Ms. Shelton's broad professional experience includes Criminal Justice, Child Protection and Advocacy, Human Services, and more.