

Alexandra Bretschneider is the Vice President and Cyber Practice Leader at Johnson Kendall and Johnson. Alexandra's team assists clients with cybersecurity risk management strategies, brokering of comprehensive and competitive insurance, and incident response.

Carla Contreras is an industry senior analyst with RSM US LLP. Her clients span multiple industries, including nonprofit organizations, state and local governments, and health care.

Tayiika Dennis is a Principal at CliftonLarsonAllen, with more than 20 years' experience in both public accounting and private industry. She provides audit and tax services for nonprofit organizations, including OMB Uniform Guidance audits.

Ross Eichelberger is Vice President of Business Development at Portico Benefit Services, where he collaborates with leaders across the organization to assess new market opportunities, cultivate relationships with prospects, and pursue strategic partnerships.

Katherine Eilers, CPA, is a senior manager at Wipfli who specializes in working with nonprofit clients, focusing on financial department process improvement and financial monitoring.

Jessica Fleming is a Strategic Account Executive at Sage Intacct specializing in federated nonprofits. With over 25 years of experience in nonprofit financial solutions, Jessica drives impact by equipping organizations with financial planning, payroll, and accounting solutions.

Brian Gaumonti is a principal leading business development and growth within Wipfli's nonprofit, government and education practice. Brian specializes in work with federally-funded human services organizations, associations, and community-based organizations.

Alix Gruden is a Principal at CliftonLarsonAllen's Irvine office, bringing over 15 years of audit and attestation expertise. Alix serves clients across various industries, including nonprofit organizations, employee benefit plans, and construction.

Jamie Ann Hayes, CPFA, C(k)P®, AIF®. Senior Vice President, NFP. Jamie combines powerful behavioral finance strategies with the maximization of fiduciary risk management to help promote retirement confidence for both employers and employees.

Lindsey Holman is Senior Director, Products Portico Benefit Services, where she leads the strategy and development of Portico's comprehensive suite of health and wellness, retirement, life, and disability programs and products.

Jim Lindell is President of Thorsten Consulting Group, Inc., a provider of Strategic & Financial Consulting, Professional Speaking, Training, and Executive Coaching.

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. His responsibilities include preparing financial statements, composing management letters and advising clients on accounting and internal control policies.

LFMA CONFERENCE

April 9–11, 2025 | San Diego, California



LFMA 2025 AGENDA

Wednesday, April 9th

6:30 – 8:30 p.m.

Welcome Reception and Games: *Solana Court*

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, April 10th

All sessions will be held in Terrazza Ballroom.

8:00 – 8:30 a.m.

Announcements and Devotion

8:30 – 9:30 a.m.

Economic Update: *Carla Contreras, 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 & Tax 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

10:45 a.m. – 11:45 a.m.

Employee Financial Wellness: *Jamie Hayes, NFP Retirement*

Financial Wellness Programs help reduce employee turnover by addressing financial stress, a leading cause of job dissatisfaction. Jamie will provide insight into running an effective Financial Wellness Program.

11:45 a.m. – 12:00 p.m.

Uniform Guidance Changes: *Tayika Dennis & Alix Gruden, Clifton, Larson, Allen*

The Uniform Grants Guidance has been updated for 2024 with several key changes. Clifton, Larson, Allen will walk us through the implications for nonprofits.

12:00 p.m. – 1:30 p.m.

Networking Lunch: *Solana Court*

1:30 p.m. – 2:30 p.m.

Cyber Security, Cyber Concierge, & Tabletop Exercises: *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

2:30 – 3:30 p.m.

3:30 – 3:45 p.m.

3:45 – 4:45 p.m.

Evening

Friday, April 11th

8:00 – 8:30 a.m.

8:30 – 9:30 a.m.

9:30 – 10:30 a.m.

10:30 – 10:45 a.m.

10:45 a.m. – 11:45 a.m.

11:45 a.m. – 12:15 p.m.

12:15 p.m.

trends in attacks, key risk management tactics, latest regulatory & insurance changes, and a playbook of incident response.

Health Insurance Trends: *Ross Eichelberger and Lindsey Holman, Portico*

Portico will provide an overview of the latest market trends in the Health Insurance arena and provide some oversight into one of our largest spend categories.

Break

Driving Financial Accountability & Outcomes: *Jessica Fleming, Sage; Katherine Eilers and Brian Gaumont, Wipfli*

Learn the secrets of effectively engaging program staff in the finance discussion to provide better outcomes for clients.

Dinner on Your Own/Group

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

All sessions will be held in Terrazza Ballroom.

Welcome and Devotion

Developing Leadership Skills: *Jim Lindell, Thorsten Consulting*

Find out what accountants need to know and develop to become great leaders of the future.

Open Forum

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.

Break

Ethics: *Jim Lindell, Thorsten Consulting*

Ethics in accounting refers to the moral principles and values that guide the behavior of accounting professionals. Listen to Jim speak about the importance of this cornerstone principle.

LFMA Board Meeting

Adjourn