Dear Colleagues,

You are invited to join us for the 30th Annual FMA Conference, Honoring the Past, Embracing the Present and Shaping the Future. As our theme suggests, we will come together to honor the past, embrace the present and shape the future!

This year’s agenda will reflect where we’ve been, where we are currently and where we’re going in the ever changing supports available for rehabilitation agencies. This is our opportunity to shape the future of financial management in New York State for year’s to come.

The sessions offered during this statewide event offer the most up-to-date information about the many challenges and opportunities facing rehabilitation agencies in New York State. We encourage you to join your colleagues and receive timely and pertinent education and information on services, collaborations and practices in the DD field right now.

We look forward to seeing you there!

Sandy Radziwon
Sandra Radziwon, Conference Chairperson
30th Annual FMA Conference

SCHEDULE AT A GLANCE

**WEDNESDAY, MAY 3**

8:00AM
Registration Begins

9:00-10:15AM
Session 1

10:30-11:45AM
Session 2

12:00-1:00PM
Welcome Lunch

1:15-2:30PM
Session 3

2:45-4:00PM
Session 4

4:15-5:30PM
Session 5

**THURSDAY, MAY 4**

8:00AM
Registration Begins

9:00-10:15AM
Session 6

10:30-11:45AM
Session 7

12:00-1:00PM
Lunch

1:15-2:30PM
Session 8

2:45-4:00PM
Session 9

4:15-5:30PM
Session 10

**FRIDAY, MAY 5**

9:15-10:30AM
Session 11

10:30-11:30AM
FMA Business Meeting

12:00PM
Lunch

**EVENING ACTIVITIES**

**WEDNESDAY, MAY 3**

6:00-7:00PM
Welcome Reception at the Baseball Hall of Fame
Sponsored by: Focused Wealth Management

7:00PM
Dinner Celebration & FMA Awards
Sponsored by: Key Insurance & Benefits Services

9:00PM
Coffee, Cordials & Karaoke
Sponsored by: Dopkins & Company

**THURSDAY, MAY 4**

6:00-8:30PM
Vendor Trade Show Dinner & Dessert Reception
Sponsored by: Relph Benefit Advisors

9:00PM
FMA Networking in the Templeton Lounge
Sponsored by: Rose & Kiernan Insurance

*Study the past if you would define the future.*

- Confucius

*CPE Credits will be available for all sessions.*

*This schedule is subject to change.*
**WEDNESDAY, MAY 3**

8:00AM REGISTRATION BEGINS

9:00-10:15AM SESSION 1
A. Avoiding Litigation & Fiduciary Pitfalls
Peter Marigliota & John Jezsu / Strategic Benefit Services
B. What OMG Looks for in a Compliance Program Review
Matthew Babcock & Joshua Ives / Bureau of Compliance
C. Understanding the NY Paid Family Leave Law
Peter Godfrey, John Godwin, & Emina Poncanin / Hodgson Russ

10:30-11:45AM SESSION 2
A. How to Prepare for the Latest Nonprofit Industry Challenges
Matthew Becker, Jeremy Meisel & Michael Klingele / BDO USA
B. Managing the “Unmanageable” in an OPWDD Environment
Erik Geizer / NYSARC, Inc & Robert Hussar / Barclay Damon
C. Protecting Your Balance Sheet: Responding to Regulatory Risk
Jennifer Wallace / Key Insurance
D. Six Stigma DeMystified! (A Person Centered Approach)
Ralph Jeswald / Dopkins & Company

12:00-1:00PM WELCOME LUNCH

1:15-2:30PM SESSION 3
Update from the Department of Health
Donna Cater & Janet Baggetta / NYS DOH

2:45-4:00PM SESSION 4
A. Fiduciary Rule: In or Out? What Does This Mean for My Retirement Plan?
Philip DeAngelo, Charles Yamold & Jesse Frehling / Focused Wealth Management
B. Generational Diversity Awareness - A Key to Shaping Your Agency’s Future
Ralph Jeswald & Sarah Hedges / Dopkins & Co.
C. Cost Allocations, Rate Rationalization, Template / Priority One Individuals & More
Gerald Archibald, Nancy Snyder, Terrence Phillips, Bettina Lipphardt, Robert Urban & Mark Waterstram / The Bonadio Group
D. Nonprofit Accounting: A Year of Change...A Shift in Accounting & Reporting
David Rottkamp / Grassi & Co.

**THURSDAY, MAY 4**

8:00AM REGISTRATION BEGINS

9:00-10:15AM SESSION 6
A. State of the Not-For-Profit Sector 2017
Matthew Lerner / Grant Thornton LLP
B. Managed Care Readiness Strategies
Steven Herbst / Loeb & Troper
C. Budgeting: Accounting vs. Accountability
Matt Huefner / Dopkins & Company
D. Next Exit: The Future
Robert Relph, Tom Burgess & Mark Pulinski / Relph Benefit Advisors

10:30-11:45AM SESSION 7
A. Strategies for Rate Rationalization
Brian O’Reilly / Loeb & Troper
B. The Future of the Affordable Care act Under the New Administration
Daniel Colacino / Rose & Kiernan
C. Financial Projections for Integrated Care for Behavioral Health & Substance Abuse
Joseph Tomaino, Stephanie Fiedler / Grassi & Co.
D. Pointers & Pitfalls in Preparing for and Resolving OSC, OPWDD & OMG Audits
Jane Ryan, Robert Hussar / Barclay Damon

**SCHEDULE AT A GLANCE**

12:00-1:00PM LUNCH

1:15-2:30PM SESSION 8
Update from NYS OPWDD
Joanne Howard / NYS OPWDD

2:45-4:00PM SESSION 9
A. Transformation Panel, CCOs, & Future Managed Care Models and Timeline
Gerald Archibald & Terrence Phillips / The Bonadio Group
B. Cyber Security Game
Eric Gorman / Integrated Enterprise Solutions, Inc.
C. Impact Your Financial Bottom Line: Navigate OSHA Compliance & Avoid Fines
Kat Pagano & Irene Jones / Marshall & Sterling

4:15-5:30PM SESSION 10
A. How is the IRS Using the Form 990 as an Audit Mining Tool
Scott Thompsett / Grant Thornton LLP
B. NY Justice Center: Evolving Challenges & Practical Tips for Providers
Robert Hussar / Barclay Damon & Erik Geizer / NYSARC, Inc.
C. Understanding the Financial Aspects of Health Benefits
Peter Abitanto / Brown & Brown of New York
D. The Financial & Safety Impact of Keeping Fleet Vehicles Too Long
David Guthaim & Jacob Garth / Enterprise Fleet Management

**FRIDAY, MAY 5**

9:15-10:30AM SESSION 11
A. Top Audit Activity Findings: Finance, Compliance, Medicaid Documentation
June Crawford, Paul Mayer & Terrence Phillips / The Bonadio Group
B. Don’t Get Burned - Thomas DiNapoli, NYS Comptroller, Presents His Fraud Detection & Prevention Training Program
Stephon Pereyra & Danell Rossi / NYS OSC

10:30-11:30AM FMA BUSINESS MEETING

12:00PM LUNCH

*CPE Credits will be available for all sessions. This schedule is subject to change.*