

# 30th Annual FMA CONFERENCE

*Honoring the Past Embracing the Present Shaping the Future*

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

May 3 - 5, 2017

The Otesaga Resort Hotel  
Cooperstown, NY

## Celebrating 30 Years of FMA

# 30th Annual FMA CONFERENCE

May 3-5, 2017

The Otesaga Resort Hotel, Cooperstown, NY

[CLICK HERE TO REGISTER TODAY!](#)

## 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 Marigiotta & John Jezsu / Strategic Benefit Services*

**B. What OMIG 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 Poricanin / 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 Yarnold & 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.*

**4:15-5:30PM SESSION 5**

**A. Surviving Your DOL Audit**

*Lisa Allen / Relph Benefit Advisors*

**B. Understanding NYS Paid Family Leave & The Risks of Cyber Liability**

*Dave Sebastianelli, Patrick Nichols & John Condon / Brown & Brown Insurance*

**C. Applications & Dashboards for Waiver Services Financial Records Tracking**

*Dr. Mark Green / Janus Systems & Denise Bienko and Susan Mancuso / People, Inc.*

**D. Inquiring Minds Want to Know**

*Al Kaplan & Amy West / AHRC NYC, Panel TBA*

**WEDNESDAY EVENING**

**6:00-7:00PM** Focused Wealth Management's Welcome Reception at the Baseball Hall of Fame

**7:15PM** Key Bank's Dinner Celebration & FMA Awards

**9:15PM** Coffee, Cordials & Karaoke

Sponsored by Dopkins & Company

**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 & OMIG Audits**

*Jane Ryan, Robert Hussar / Barclay Damon*

**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**

*Katy Pagano & Irene Jones / Marshall & Sterling*

**D. GAAP Update**

*Ellen Labita, Gordon Siess, Patrick Yu / Baker Tilly*

**4:15-5:30PM SESSION 10**

**A. How is the IRS Using the Form 990 as an Audit Mining Tool**

*Scott Thompson / 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*

**THURSDAY EVENING**

**6:00PM** Relph Benefit Advisors Vendor Trade Show with Dinner & Dessert Reception

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

**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 & Daneil Rossi / NYS OSC*

**10:30-11:30AM FMA BUSINESS MEETING**

**12:00PM LUNCH**

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