

## Calendar of Events

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October 23, 2019

**MAP SIG - Open Discussion**

*Topic: Open Discussion*

*A complimentary lunch will be provided.*

October 23, 2019

**ATT SIG - TBD**

**Maggiano's Little Italy**

**Tysons Galleria**

**Mclean, VA 22102**

*Mark your calendars - save the date!*

*This meeting will be held prior to the Chapter Meeting at Maggiano's.*

*More details to follow...*

October 23, 2019

## **Chapter Meeting - Transforming a Top Organizational Liability into an Asset - while Improving**

**Maggiano's Little Italy**

**Tysons Galleria**

**McLean, VA 22102**

04:00 PM - 09:00 PM EST

Page Eastman,

info@ncvscpa.org

*Topic: Transforming a Top Organizational Liability into an Asset – while Improving the Quality of a Benefit Plan*

### *Objectives:*

*We will provide insights and recommendations to help your company, or your clients, untangle from the web of confusion that's tying them to ever increasing healthcare costs.*

*The amount that employers spend on healthcare has risen at least at twice the rate of inflation. Large employers are predicting that their health care costs will rise by 5-6% in 2020; and small to mid-size employers typically spend more per employee. In the past, the solutions for containing costs have been scarce. Employers have had two choices: increase costs or dilute coverage. Times have changed – there are now creative ways that an employer can improve the quality of their health plan while decreasing costs.*

*This session will be split between a presentation, and a panel discussion that will review various case studies. It will break down the basics of the Affordable Care Act (ACA), and cover steps that employers can make to take control of their benefits plan.*

### *What Participants Will Learn:*

#### *ACA Basics:*

*Lessons learned from regulating insurance, but not healthcare.*

*How the ACA legislated profits for insurance companies and the impact on Employers.*

*Tax implications, including the return of the Insurer Tax in 2020.*

#### *How an employer can take control of their benefit plan:*

*How to develop a strategic plan of action to regain control*

*Questions to ask your insurance advisor or broker*

*Common sense steps to restore the word “benefits” to their benefits program*

*Why education is the missing link, and how to empower employers and employees alike.*

### *Speakers:*

*Derek Winn*

*Derek is a Lead Consultant at The Business Benefits Group, where he has consulted clients regarding employer sponsored benefit programs for nearly the past decade.*

*More recently he is a co-founder of Distilled Concepts, a newly created organization that is purpose built to provide more advanced advisory and consulting exclusively for Employers of intention, and also counsel on solutions from the industry as a whole. When supporting health plans for clients, they work solely with self-insured Employers, or serving as a bolt-on advisor for the eventual transition to a self-funded health plan, providing distilled client education and strategy.*

*Derek has been recognized as a Rising Star in Advising by EBA Magazine, interviewed in Managed Care Magazine, and also a contributor to Benefits Pro Magazine. When it comes to Social Media, he is most active on LinkedIn.*

*Jessica DuBois*

*As an Employee Benefits Consultant with the Business Benefits Group (BBG), Jessica helps companies design an employee-centric benefits program, focused on cost-containment and user experience. Jessica was named 2019 Face of Change by BenefitsPro magazine and has been featured on multiple podcasts around healthcare and humanizing the workplace. Jessica has recently become Health Rosetta certified, a certification which requires complete transparency and aligned incentives to clients.*

*Eddie Castro (panelist)*

*Eddie is a Regional Practice Leader for Roundstone, which works with small to mid-size employers to implement innovative benefit solutions while saving clients an average of 20 percent. Since 2005, Eddie has been a leading innovator in providing captive solutions for a variety of exposures, including health and voluntary benefits. Prior to joining Roundstone, Eddie has a wealth of experience with self-insured organizations to help them recognize their risk and identify ways to improve processes and reduce costs.*

October 29, 2019

**SIG PFP - Analyzing a Client's Investment Portfolio**

**M & T Bank Corporate Offices**

**7799 Leesburg Pike, 6th Floor**

**Falls Church, VA 22043**

07:30 AM - 09:00 AM EST

John Mongold,

[jmongold@wilmingtontrust.com](mailto:jmongold@wilmingtontrust.com)

*Topic: Analyzing a Client's Investment Portfolio*

*Overview:*

*Client investment portfolios can take shape in various ways. With various products, asset allocation models, and a diverse number of advisor types, it can be difficult to know whether the advice your client is receiving (or not receiving) is right for them. This presentation is designed to provide you with information that will allow you identify the investments in your client's portfolio, whether they make sense for them, the type of advisor they have, and if they are getting the right kind of advice for their personal / professional situation.*

*Objectives:*

*During this discussion, participants will:*

*Learn about the different advisor types in the financial advisory industry*

*Read types of investment statement types and how to evaluate them based on your client's situation*

*Become more knowledgeable of how investment portfolios are designed and marketed.*

*Speakers: John Mongold, CFA CPA, Vice President, Wilmington Trust*

*Dustin Witmer, Vice President, Financial Advisor for M&T Securities*

*Time: Doors Open 7:30 AM; Meeting 8 to 9 AM*

*One hour CPE available*

October 30, 2019

**SIG CFO & Controllers - Revenue Recognition Standard ASC 606 Lessons Learned**

**Cordia Partners**

**8330 Boone Blvd**

**Vienna, VA 22182**

07:30 AM - 09:00 AM EST

Stephanie Scarola ,

[sscarola@expensereduction.com](mailto:sscarola@expensereduction.com)

*Topic: Revenue Recognition Standard ASC 606 Lessons Learned*

*With the effective date of January 1, 2019 for ASC 606 for nonpublic entities, we will discuss lessons learned in the implementation and disclosure requirements.*

*Speakers: Mike Cannon and Sirena Johnson,*

*Citrin Cooperman Government Contracting Practice*

November 12, 2019

**Government Contracting SIG - How to Prepare for Various DCAA Audits**

**Tower Club**

**8000 Towers Crescent Drive**

**Tysons, VA 22182**

07:00 AM - 09:30 AM EST

William Maxwell,

womaxwell703@gmail.com

*Please mark your calendar for this upcoming breakfast.*

*Speaker: Javier Diaz, Cherry Bekaert LLP, How to Prepare for Various DCAA Audits*

*Location: Tower Club, 8000 Towers Crescent Drive, Suite 1700, Tysons, VA 22182.*

*Please check the 17th Floor receptionist to find our room, and get your parking validated.*

*<http://www.clubcorp.com/Clubs/The-Tower-Club-Tysons-Corner>*

*Sponsor: Access National Bank is a Gold Sponsor of the IMA Government Contractor Breakfasts, allowing us to host the events at the Tower Club for a reasonable price.*

*Registration & Price: \$30 prepaid or \$35 cash/check at the door.*

*Your advance registration helps us to ensure that the room size is adequate.*

*1 hour of CPE, along with a breakfast buffet.*

*Doors open at 7:00am, Speaker starts at 8:00am, done by 9:30am.*

November 19, 2019

**Chapter Event**

**Fairview Park Marriott**

**3111 Fairview Park Drive**

**Falls Church, VA 22042**

04:00 PM - 09:00 PM EST

*More details to follow.*

November 21, 2019

**Non-Profit SIG - TBD**

**National Hospice & Palliative Care Organization**

**1731 King Street, Suite 100**

**Alexandria, VA 22314**

08:00 AM - 09:30 AM EST

Brian Wendroff, 703-553-1099

[bjwendroff@wendroffcpa.com](mailto:bjwendroff@wendroffcpa.com)

*Save the Date!*

*Topic: TBD*

*Presentation by: TBD*

December 11, 2019

**MAP SIG event - MAP Survey: Highlights and Lowlights**

*Topic: NCVSCPA MAP Survey: Highlights and Lowlights*

*A complimentary lunch is provided.*

December 17, 2019

**Chapter Event**

**Fairview Park Marriott**

**3111 Fairview Park Drive**

**Falls Church, VA 22042**

04:00 PM - 09:00 PM EST

*More details to follow.*

January 14, 2020

**Chapter Event - Tri-State Tax Conference**

**Fairview Park Marriott**

**3111 Fairview Park Drive**

**Falls Church, VA 22042**

04:00 PM - 09:00 PM EST

*Tri-State Tax Conference.*

*More details to follow.*

January 14, 2020

**Government Contracting SIG - DCAA Update and Current Initiatives**

**Tower Club**

**8000 Towers Crescent Drive, Suite 1700**

**Tysons, VA 22182**

Bill Maxwell,

womaxwell703@gmail.com

*Please mark your calendar for this upcoming breakfast.*

*Speaker: DCAA*

*Location: Tower Club, 8000 Towers Crescent Drive, Suite 1700, Tysons, VA 22182.*

*Please check the 17th Floor receptionist to find our room, and get your parking validated.*

*<http://www.clubcorp.com/Clubs/The-Tower-Club-Tysons-Corner>*

*Sponsor: Access National Bank is a Gold Sponsor of the IMA Government Contractor Breakfasts, allowing us to host the events at the Tower Club for a reasonable price. 1 hour of CPE, along with a breakfast buffet.*

*Doors open at 7:00am, Speaker starts at 8:00am, done by 9:30am.*

January 16, 2020

**Non-Profit SIG - TBD**  
**National Hospice & Palliative Care Organization**  
**1731 King Street, Suite 100**  
**Alexandria, VA 22314**  
08:00 AM - 09:30 AM EST  
Brian Wendroff, 703-553-1099  
bjwendroff@wendroffcpa.com  
*Save the Date!*  
*Topic: TBD*

*Presentation by: TBD*

February 18, 2020

**Chapter Event**  
**Maggiano's Little Italy**  
**Tysons Galleria**  
**McLean, VA 22102**  
07:30 AM - 10:00 AM EST  
*More details to follow.*

March 17, 2020

**Chapter Event**  
**Maggiano's Little Italy**  
**Tysons Galleria**  
**McLean, VA 22102**  
07:30 AM - 10:00 AM EST  
*More details to follow.*