



GOVERNMENT FINANCE OFFICERS ASSOCIATION
WASHINGTON METROPOLITAN AREA

BEST in CLASS
Conference

Washington Marriott at Metro Center

September 15, 2016

AGENDA

11:20 a.m.—11:30 a.m. Network and Opening Remarks

Mohamed Mohamed,
CFE, CICA
GFOA-WMA President

Associate Chief Financial
Officer
Government Operations
Cluster
Office of Finance and
Resource Management

11:30 a.m.—12:30 p.m. Session I

**Best in Class Public
Retirement Solutions**

George Spindell, ChFC
Director, Retirement
Products
ICMA-RC

Greg Dyson
Senior Vice President
and Chief Operating
Officer
ICMA-RC

Gerald Backenstoe
Vice President
Marketing Operations
ICMA-RC

12:30 p.m.—1:45 p.m. Luncheon

Jr. Ballroom, 2nd Floor

1:45 p.m.—2:45 p.m. Session II

**Creating the Best in
Class Customer
Service: The Internal
and External Customer**

Eva M. Liggins
Director, Customer
Service Administration
Office of the Chief
Financial Officer
Office of Tax and
Revenue

2:45 p.m.—3:35 p.m. Session III

**Best in Class Fraud
Mitigation Tactics**

David B. Buckley
Managing Director
Federal
KPMG

SAVE THE DATE!



GFOA-WMA ANNUAL CONFERENCE

Thursday, November 16, 2016

Washington Marriott at Metro Center

775 12th St., NW

Washington, DC

GFOA^{***}WMA

GOVERNMENT FINANCE OFFICERS ASSOCIATION
WASHINGTON METROPOLITAN AREA

AWARDS PROGRAM DEADLINE: OCTOBER 15, 2016

The Government Finance Officer Association of the Washington Metropolitan Area (GFOA-WMA) has established an Awards Program that is comprised of several highly regarded professional recognition awards to encourage state and local governments in the Washington, D.C. metropolitan area to improve the quality of their financial management and to be recognized for their achievement during the period from July 1st to June 30th of each year. Our Awards Program also recognizes GFOA-WMA members for their commitment to serving our community; extraordinary accomplishment in recruiting new members into our organization; and for their commitment to serving the membership of the organization throughout the year. Winning these awards is a high level professional acknowledgement within the public finance profession and will provide examples for others to follow.

The awards are made on an annual basis. Nominations may be made by any GFOA-WMA member (self nomination is permitted) and the GFOA-WMA Board shall select the recipients. Nominations for the FY2016 awards program will be accepted from August 29, 2016 through October 15, 2016.

Award recipients will be announced at the Annual Conference held in November.

What GFOA-WMA Will Provide to Award Recipients

In addition to receiving a plaque or certificate, depending on the award, a press release will be issued by the GFOA-WMA that recognizes the award recipients as well as provides recognition on the GFOA-WMA website. Recipients of the following awards will also receive a \$25 gift card: Award for Excellence in Government Finance (Individual Award Category) and the Community Service Award. The Award for Excellence in Government Finance (Group Award Category) shall receive a \$100 gift card to be shared by the group winners. Additionally, the recipients of the Awards for Excellence in Government Finance will also receive a one year membership in GFOA-WMA; and the recipient of the Lifetime Achievement Award in Government Finance will receive an honorary "Lifetime" membership in the GFOA-WMA.

You will find the Awards Program Submission Form online at www.gfoa-wma.org



George Spindell, ChFC
Director, Retirement Products
ICMA-RC

George Spindell, ChFC is the Director of Retirement Products for ICMA-RC, which includes ICMA-RC's 401(a) and 457 retirement plans. His primary focus is on building and maintaining a spectrum of retirement income solutions designed to help Public Sector Employees Build Retirement Security. This includes a series of products designed to guarantee lifetime income and provide pension like benefits

from a defined contribution plan.

Before joining ICMA-RC in November 2006, Mr. Spindell was the Director of Wealth Management Product with TIAA, where he was responsible for the management and development of various annuity products.

Mr. Spindell received a Bachelor's degree in Communications from William Paterson University. He is a FINRA Series 7 Registered Representative. He also holds insurance licenses in various states.



Gregory Dyson – Senior Vice President and Chief Operating Officer
ICMA-RC

Gregory Dyson joined ICMA-RC, a leading provider of public sector retirement plans, in 2002. A member of the senior management team and a seasoned marketing and financial services professional, Mr. Dyson oversees the corporation's marketing program as well as the operations and information technology infrastructure that provides services and administration resources to more than 9,000 plans and over a million public sector participant accounts.

Mr. Dyson provides strategic direction for ICMA-RC's plan sponsor and investor services, financial planning, and product development initiatives.

Mr. Dyson is an active leader in public sector policy, including serving on the Board of Directors of the Center for State and Local Government Excellence. In addition, he serves as the executive administrator of the ICMA-RC Vantagepoint Public Employee Memorial Scholarship Fund, which has raised more than \$1 million for scholarships awarded to surviving relatives of public sector employees who have died in the line of duty.

Mr. Dyson also serves on the National Forum for Black Public Administrators Corporate Advisory Council and on the ICMA Corporate Partner Council, and is a member and past co-chair of the National League of Cities (NLC) Corporate Partnership Advisory Council. He recently served on NLC's National Black Caucus of Local Elected Officials Foundation Board.

Prior to joining ICMA-RC, Mr. Dyson held marketing management and business development positions with a national real estate services firm.

Mr. Dyson graduated from Ohio Wesleyan University with a B.A. in Journalism and Government. He earned an M.B.A. from the Darden School at the University of Virginia.



**Gerald Backenstoe, Vice President
Marketing Operations
ICMA-RC**

Gerald Backenstoe has over 25 years experience with ICMA-RC and currently serves as Vice President, Marketing Operations, where he oversees the development and maintenance of the various ICMA-RC public websites. He also leads and directs various strategic projects and strategies including those that lead to innovative digital technologies. Prior to his role in marketing, Mr. Backenstoe led ICMA-RC's various contact teams (participant, plan sponsor, email, Premier

Services, and Washington State) for 11 years, where he was responsible for establishing and maintaining contact center standards and performance.

Mr. Backenstoe has also served as a corporate trainer responsible for developing curricula and conducting training seminars on ICMA-RC's record keeping and support systems for operations, marketing, and customer service associates. Earlier, Mr. Backenstoe was a supervisor in our Client Solutions Group for over five years and a customer service representative for one year.

Mr. Backenstoe holds a degree in political science from Denison University in Ohio. He is a Series 6 and 63 FINRA Registered Representative, a Series 26 Principal, and a Series 65 Investment Advisor.



**David B. Buckley
Managing Director– Federal
KPMG**

David is a Managing Director in KPMG's Federal Practice, specializing in investigations, forensic applications and risk mitigation strategies concerning internal and external threats to federal business operations. He is a former Inspector General of the Central Intelligence Agency and

federal career senior executive, having also served in the Departments of Treasury, Defense and the U.S. Air Force. Additionally, Mr. Buckley served as the Chief Investigator for the U.S. Senate Permanent Subcommittee on Investigations and as the Democratic Staff Director for the House Permanent Select Committee on Intelligence. He has over 40 years of professional experience conducting and leading investigations, examining public policy and conducting audits, evaluations, and regulatory inspections. He has testified in federal criminal courts and before U.S. congressional committees.



**Eva M. Liggins
Director, Customer Service Administration
Office of the Chief Financial Officer
Office of Tax and Revenue**

Eva M. Liggins is the Director of Customer Service Administration for the District of Columbia Office of Tax and Revenue. She is responsible for overall management of the agency's multi-channel contact center. She began her employment with the agency in December 2011.

Ms. Liggins has 32 years of customer service management experience in the private and public sectors. Prior to her current position she was the director of 311 Dallas where she managed the 311 Call Center, Water Customer Service, Dispatch Operations and the Courts and Detention Services Call Center. She also served as chairwoman for the national 311 Synergy Group in 2010 and 2011. Prior to joining the city of Dallas, she was Director of Customer Service at DC Water where she oversaw customer service and information systems, credit and collections, billing, and meter and field services.

Previous positions include serving as vice president for the Title Approval for the Chesapeake Appraisal & Settlement Services, Inc. in Columbia, MD, Administrative Service Manager for Arval (formerly PHH Vehicle Management Services), and Circulation call center and District Sales Manager for The Baltimore Sun. She holds a bachelor's in psychology from Hampton University, Hampton, Va. Ms. Liggins is also a graduate of the Executive Leadership Institute of the National Forum for Black Public Administrators.

Thank you to our Annual Partners

Platinum



Diamond

