

2021 Illinois Municipal Treasurers Association Institute **Speakers & Biographies**

A.J. Weber, Director, Lauterbach & Amen:

A.J. Weber has over 11 years of professional accounting experience, the majority of which has been within the governmental and private sectors of public accounting. He has participated in and overseen countless engagements ranging from government financial statement compilations to corporate tax and compliance.

Aaron Allen, Local Tax Allocation Division, Illinois Department of Revenue

Aaron received a B.S. in Agribusiness, Farm, and Financial Management from the University of Illinois at Urbana-Champaign and a M.B.A. from the University of Illinois at Springfield. He has worked for the Department of Revenue for 14 years in the Motor Fuel Division, Audit Division, as the Section Manager of the Alcohol and Tobacco Processing Section, and now as the Division Manager of the Local Tax Allocation Division since April 2018.

Brad Cole, Executive Director, Illinois Municipal League

Brad has served as the executive director of the Illinois Municipal League since 2014. Brad brings a wealth of knowledge having experience as Senior VP of Pepsi MidAmerica, Downstate Director for U.S. Senator Mark Kirk, Mayor of the City of Carbondale, and Deputy Chief of Staff to Governor George H. Ryan. Brad is an active leader for numerous public and private organizations at the local, regional, and federal levels.

Separate from the League, Brad serves as Managing Director of the IML Risk Management Association (RMA), a statewide leader in municipal insurance, loss control and risk management services. Cole is a graduate of Southern Illinois University at Carbondale with a bachelor's degree in a double major of political science and biological sciences, and a master's degree in legal studies from the SIU School of Law. He originally hails from Macon, Illinois.

Dan Ryan, Project Coordinator, Illinois Public Pension Fund Association

Daniel W. Ryan is a project coordinator for the Illinois Public Pension Fund Association. He is a former municipal treasurer (Skokie) and a retired Taft-Hartley health and pension fund administrator. Dan holds the Certified Employee Benefit Specialist (CEBS) designation from the International Foundation of Employee Benefit Plans and the University of Pennsylvania. He is the author of *Social Security for State and Local Government Employees* and a contributor to the *IPPPFA Retirement Guide*.

Fred Lantz, Director Government Services, Sikich LLP

Frederick G. Lantz, CPA, is responsible for providing technical services to Sikich's clients in all areas of governmental accounting, auditing, financial reporting, budget development, revenue and expenditure forecasting, and cash and debt management. Prior to joining Sikich, Fred was the assistant director for the Technical Services Center of the Government Finance Officers Association of the United States and Canada (GFOA), where he was a nationally recognized expert in the state and local government industry. At GFOA, Fred was responsible for managing the Certificate of Achievement for Excellence in Financial Reporting Program, providing accounting, auditing and financial reporting assistance to state and local government officials and their auditors, and serving as a liaison to the Governmental Accounting Standards Board. Fred also developed courses and served as lead instructor for governmental accounting, auditing, and financial reporting training courses. He is a nationally recognized speaker, having spoken at state GFOA and CPA Society meetings and conferences.

Jamie Wilkey, Audit Technical Partner, Lauterbach & Amen, LLP

Jamie Wilkey has over 20 years of professional accounting experience exclusively in the governmental sector. She has participated in numerous governmental engagements, including municipalities, park districts, school districts, libraries, special districts, and various other units of government.

Jana Hattey, Community Bank President, Executive Vice President Treasury Management

Jana Received her Bachelor of Science degree in Business Administration and Accounting from Culver-Stockton College and MBA from Quincy University. She is an ABA Certified Relationship Sales Trainer, ABA Certified Small Business Banking Trainer and an ABA Certified Bank Marketer and received Moody's Financial Certification in Commercial Lending. Jana has 23 years of experience in customer service, treasury management, audit, compliance, asset and liability management, operations, management information systems, contract and legal research, management, training, presentation, marketing, public relations, and sales. Her Focus is on small businesses, corporate banking, non-profits, and municipalities. She serves on the board for Quincy Chamber of Commerce, Advocacy Network for Children, Horizons Social Services, Culver-Stockton College Advisory and Alumni

John Fishbein, Senior Program Manager, Government Finance Officers Association

John Fishbein is a senior program manager in the Technical Services Center of the Government Finance Officers Association of the United States and Canada (GFOA) in Chicago, Illinois. Mr. Fishbein came to GFOA in 2002. He is responsible for the day-to-day operation of GFOA's Distinguished Budget Presentation Awards Program. He is the author of GFOA's recent publication on Building a Better Budget Document. He previously authored Preparing High Quality Budget Documents for School District's and Preparing High Quality Budget Documents. He serves as staff to GFOA's standing Committee on Governmental Budgeting and Fiscal Policy. He has spoken at national and Internet training seminars and conferences on budgeting.

Lance Lippert, Ph.D., Professor of Communication at Illinois State University

He is the Program Coordinator for the Communication Studies Program in the School of Communication. Lance has published on topics in the areas of organizational, health, and instructional communication. He holds degrees from Southern Illinois University, Carbondale, and Fort Hays State University. He has consulted for various public, private, and governmental organizations including health care, small business, large and small corporations, education (higher education and K-12), and non-profits to help them improve organizational effectiveness. Presently, he teaches organizational communication, leadership communication, health communication, training & development, and qualitative research methods.

Laura Harter, Deputy Bureau Chief, Public Access Bureau, Office of the Attorney General

Laura has been with the Attorney General's Office for 5 years and is currently a Deputy Bureau Chief in the Public Access Bureau. Prior to joining the Attorney General's Office, Laura was a litigator in private practice in Washington, D.C. and Boston, Massachusetts. She also clerked for the United States District Court for the District of Maryland. Laura received her bachelor's degree from the University of Virginia and her law degree from American University.

Lindsey Fish, CPA, Senior Manager, Sikich LLP

Lindsey Fish, CPA, is a senior manager at Sikich where she began her career in 2013. Lindsey provides assurance and advisory services to a variety of municipalities, counties, community colleges, park districts, school districts and other special districts. Lindsey is responsible for managing the overall engagement and the engagement team to ensure client deadlines are met or exceeded. Lindsey is a member of the Illinois Government Finance Officers Association, serving on the board of the Rock River Chapter, the Illinois Association of School Business Officials and the Illinois Association of Counties speaking frequently for these organizations on a variety of accounting, auditing, and internal control topics.

Matt Hanigan, Senior Managing Consultant, PFM Asset Management LLC

Matt Hanigan joined PFM in January 2015 and is currently a senior managing consultant in the Chicago office. Matt helps municipal governments, school districts and other public sector clients in Illinois with their overall investment needs. His current responsibilities include cash flow modeling, developing investment policies, evaluating investment performance, providing economic summaries and research, monitoring investment guidelines and strategy development & implementation. He also provides PFM's Midwest clients with technical & analytical support with respect to their investment portfolios. Prior to joining PFM full time, Matt graduated from Western Michigan University and was an intern in PFM's Chicago office during the Fall of 2014.

Melanie Santostefano, Vicarious Multimedia

Melanie Santostefano is the president and founder of Vicarious Multimedia (VM), a boutique communications firm that provides Marketing Communications, Public Relations and Video Production services to municipalities, townships, professional associations, and nonprofits. Prior to founding VM, Melanie had a career in the news media in both radio and web-based news. She was a writer, reporter and broadcaster for stations including Newstalk 1340 WSOY in Decatur, and at Chicagoland stations NewsRadio 780 WBBM and WLS 89AM. She also served as an editor for Arlington Heights and Palatine Patch.com news sites. Melanie is the proud daughter of immigrants and comes from a family of boot-strapping entrepreneurs. She has a 12-year-old son named Charlie and lives in an historic home in downtown Palatine (Illinois) along the family dog, Hawkeye.

Michael Peterson, City Comptroller, City of North Chicago

Michael Peterson has been an Illinois Municipal Finance Director/ Treasurer for the past 36 years for the Villages of East Alton (14), Grayslake (14) and Lincolnshire (8). He graduated in 1985 from Bradley University with a BA in Accounting. Michael retired July 30, 2021, created an LLC, and entered into a two-year contract with the City of North Chicago as City Comptroller.

Peterson has been an Illinois Municipal Treasurer Assoc (IMTA) member for 36 years. During that time, he has served three terms as President, participated as moderator and speaker at annual conferences & Treasurers Institute, and currently serves as website chair.

Michael was born in Chicago and raised in the south side suburb of Oak Forest. He and his wife Penny live as "empty nesters" in Lake County. Their two daughters, husbands, and three grandchildren also live in Lake County. Michael enjoys fishing, boating, golfing, GATA reporting, and Sunday morning motorcycle rides to breakfast with Penny.

Michelle Binns, Senior Managing Consultant, PFM Asset Management LLC

Michelle Binns Senior Managing Consultant PFM Asset Management LLC Michelle Binns joined PFM in 2006 and is a senior managing consultant staffed in the Chicago office. In her current capacity, she works closely with public sector clients to develop and implement prudent investment strategies for short, intermediate, and long-term funds, including fixed income and multi-asset class portfolios, for a variety of government clients in Illinois. Her responsibilities include investment performance analysis, cash flow modeling, portfolio structuring and restructuring, providing economic summaries and research, and evaluating investment policies and practices for compliance with state and local investment statutes. Michelle is a member of both the Illinois Government Finance Officers Association's South Metro Board and its Partners Forum. She is also the Chair of the Advocacy and Action Committee of PFM's Parents and Caregivers Forum and a member of the Membership Committee with PFM's Women's Network.

Michelle Casey, Executive Director of the Executive Ethics Commission (EEC)

Michelle Casey. Michelle Casey is the Executive Director of the Executive Ethics Commission (“EEC”). Michelle represents the EEC’s commitment to supporting professional opportunities for communities of color and women as Michelle is the first black and first woman to serve as the EEC’s Executive Director.

Michelle brings years of tax consultancy experience from KPMG LLP to State government. Michelle also has years of experience in State government, including serving as an attorney in the General Counsel’s Office for the Secretary of State where she advised the Administrative Hearings Department, the Budget and Fiscal Department, and the office on legislative and bankruptcy matters. Michelle also served as an attorney in the Office of the Senate President for Emil Jones, Jr., primarily focusing on tax related legislation and policy. Most recently, Michelle served as a Senior Policy Advisor and State Purchasing Officer for the Chief Procurement Officer of General Services.

Molly Grisham, Owner & Lead Facilitator, Influence LLC

Molly is passionate about personal growth, leadership development, communication, problem-solving, and conflict resolution. Additionally, she is a Certified Practitioner of the Myers-Briggs Type Indicator. She is a visionary with a heart for developing cultures and leaders who are value driven, people-centric, and service oriented. She previously served as a college soccer coach, has been employed as a teacher/professor and has served on the communication staff for several non-profit organizations.

Nathan Rice, Assistant General Counsel, Executive Ethics Commission (EEC)

Nathan Rice. Nathan Rice is an Assistant General Counsel with the Executive Ethics Commission (“EEC”). Nathan assists with the oversight of ethics and training matters and serving as the Commission’s legislative liaison and EEO Officer. Prior to joining the EEC, Nathan served as the Labor Relations Manager, Police Legal Advisor and Assistant Corporation Counsel for the City of Springfield, Illinois. Nathan is experienced in municipal law, labor, and employment law, the Freedom of Information Act, municipal licensing, and regulation.

Renyscha Brown, Bureau Chief, Illinois Emergency Management Agency (IEMA)

Renyscha is the Bureau Chief for the Bureau of Preparedness and Grants Administration at the IEMA. She previously served as Bureau Chief of Contract Compliance for the Department of Human Service and Chief of Staff on the Illinois Department of Veterans’ Affairs. Renyscha is a highly decorated retired Lieutenant Colonel with 28 years of military service. She is a life member of both the National Guard Association of Illinois and the Veterans of Foreign Wars.

Ryan Downes, CPA, Manager, Baker Tilly

Ryan Downes, CPA. Ryan is an audit manager with Baker Tilly’s IL Public Sector team and has been with the firm since 2016. He specializes in auditing services for municipalities and school districts. Prior to Baker Tilly, Ryan graduated from Marquette University.

Sofia Anastopoulos, Executive Director, Chief Investment Officer, IMET

Sofia Anastopoulos is the Executive Director and Chief Investment Officer of IMET. Sofia has spent her career working with the public sector in treasury and investment management, starting with the Government Finance Officers Association, where she was responsible for promoting best practices in treasury and investment management. Since GFOA, she has worked for an investment management firm and for her own firm, Public Funds Consulting, where she advised public sector entities in investment management best practices. Sofia is a graduate of Northwestern University and received an MBA from DePaul University in Chicago. She holds the designation of Chartered Financial Analyst (CFA).

Suzann Dennis Borland, Office of the Attorney General

Suzanne Dennis Borland worked in the Criminal Appeals and General Law Bureaus of the Attorney General's Office before joining the Public Access Bureau. In addition to her work as an Assistant Attorney General, Suzanne spent many years teaching legal studies at the University of Illinois – Springfield and planning CLE programs for the Illinois Institute for Continuing Legal Education. Suzanne received her bachelor's degree from Eastern Illinois University and her law degree from the University of Illinois College of Law.

Tim Gavin, Audit Services at Lauterbach & Amen, LLP

Tim has over 15 years of professional accounting experience exclusively in the governmental sector. He has participated in numerous governmental engagements, including municipalities, villages, park districts, school districts, and other special districts. Tim retains highly specialized skills in accounting and auditing software.

Todd Schroeder, Actuarial Services Director at Lauterbach & Amen, LLP

Todd Schroeder has 20 years of experience serving clients in the governmental and private sectors. He has participated in numerous governmental engagements, including public pension funds, school districts, villages, and various other units of government. Todd has also provided actuarial services to companies in the private sector.

Trevor Atkins, Supervisor, Local Tax Allocation Division, Illinois Department of Revenue

Trevor received a bachelor's degree in Economics from the University of Illinois at Urbana-Champaign and a M.B.A. from Benedictine University. He has worked for the Department of Revenue for 13 years. He served as the lead trainer for the Taxpayer Assistance Division, as the Section Manager of Transaction Returns for the Sales Tax Processing Division, and now as a Supervisor in the Local Tax Allocation Division since October of 2020.