



Guam Professional Development Conference

Finance 3.0: Beyond Financial Management
February 8, 2023 to February 10, 2023
Westin Resort Guam, Tumon Guam

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AGENDA

DAY ONE: Wednesday, February 8, 2023

7:00 am – 5:00 pm

Foyer of Somnak Ballroom

Registration

8:00 am – 8:45 am

Somnak Ballroom

Welcoming and Opening Remarks

Josie Villanueva, MBA, CPA, CGMA, CGFM, CSAF, SHRM-CP, PMP, President, AGA Guam Chapter

The Honorable Joshua F. Tenorio, Lieutenant Governor of Guam

Melinda Miguel, PMP, CIG, President, AGA National and Chief Inspector General for the State of Florida

8:45 am – 9:50 am

Somnak Ballroom

AM Plenary Session (1 CPE – Personal Development)

The Call for Leadership and Accountability in Today's Ever-Changing Environment

Melinda Miguel, PMP, CIG, President, AGA National and Chief Inspector General for the State of Florida

9:50 am – 10:10 am

AM Networking Break

10:10 am – 12:00 pm

Somnak Ballroom

AM Breakout Sessions (2 CPEs)

Leading Through Internal Controls (Auditing)

Billy Morehead, Ph.D., CPA, CGFM, Past-President, AGA National

Unnai 1 & 2

Guam's Financial Performance Before and After the Pandemic (Accounting – Governmental)

Doreen Crisostomo-Muna, Ph.D., CGFM, CFE, Professor of Accounting, University of Guam

Unnai 3



The Accountability Community Needs More CGFMs – a Primer on How to be a CGFM (Personal Development)

Maripaz N. Perez, CGFM, CICA, CIA, CFE, Assistant Chief Financial Officer, Guam Power Authority; Josie Villanueva, MBA, CPA, CGMA, CGFM, CSAF, SHRM-CP, PMP, President, AGA Guam Chapter; Jojo B. Guevara, MBA, CGFM, PMP, Financial Affairs Controller, Port Authority of Guam; Justin B. Castro, CGFM, CFE, Accountant I, Guam Waterworks Authority; Mary Grace Edrosa, CGFM, Controller, Department of Administration; and Pilar O. Pangelinan, MBA, CGFM, AFC, CB, Professor, Business & ViscCom Department, Guam Community College.

12:00 pm – 12:20 pm

Lunch Networking Break

12:20 pm – 1:30 pm
Somnak Ballroom

Lunch Plenary Session (1 CPE – Personal Development)

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On Becoming a Change Leader

Annette Santos, DBA, Dean Emerita, School of Business and Public Administration, University of Guam

1:30 pm – 1:40 pm

PM Networking Break 1

1:40 pm – 3:00 pm

PM Breakout Sessions (1.5 CPEs)

Somnak Ballroom



Anatomy of Payroll Fraud – Lessons Learned and Key Takeaways (Auditing)

Rafael Fernandez, Supervisory Special Agent, FBI, Guam

Unnai 1 & 2



Data Analytics: From Analysis to Application. How Data Can Help Your Organization (Information Technology)

Billy Morehead, Ph.D., CPA, CGFM, Past-President, AGA National

3:00 pm – 3:20 pm

PM Networking Break 2

3:20 pm – 5:00 pm
Somnak Ballroom

PM Plenary Session (2 CPEs – Information Technology)



Digital Transformation Strategies: Planning and Executing a Successful System Change

Panel Discussion – Melvyn K. Kwek, CISA, GICSP, Chief Information Technology Officer, Guam Power Authority, Arden B. Bonto, Systems Programmer, Port Authority of Guam and Jason V. Katigbak, MBA, CPA, CIA, CFE, CGMA, Director of Business Optimization, IP&E Holdings, LLC.

DAY ONE END



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DAY TWO: Thursday, February 9, 2023

7:00 am – 5:00 pm
Foyer of Somnak Ballroom

Registration

8:00 am– 9:45 am
Somnak Ballroom

AM Plenary Session (2 CPEs – Behavioral Ethics)

Ethical Dilemmas in Technology

Billy Morehead, Ph.D., CPA, CGFM, Past-President, AGA National

9:45 am – 10:00 am

AM Networking Break

10:00 am – 11:45 pm

AM Breakout Sessions (2 CPEs)

Somnak Ballroom

The Role of Accountants in Managing Cybersecurity Risks (Information Technology)

Melvyn K. Kwek, CISA, GICSP, Chief Information Technology Officer, Guam Power Authority

Unnai 1 & 2

Towards an Efficient and Effective Government Procurement Process (Management Services)

Yukari Hechanova, MAcc, CPA, CIA, CGFM, CPPO, Chief Financial Officer, Guam Memorial Hospital Authority

Unnai 3

Service Organization Control (SOC) Reports and Its Role in the Evolution of Business Technology (Internal Controls)

Taeyoung Park, CPA, Senior Consultant, Ernst & Young

11:45 pm – 12:00 pm	Lunch Networking Break
12:00 pm – 12:20 pm	AGA Guam Chapter Citizen-Centric Report (CCR) Awards Ceremony
12:20 pm – 1:30 pm <i>Somnak Ballroom</i>	Lunch Plenary Session (1 CPE – Economics) <i>Current Outlook on Tourism Industry and Overall Guam Economy</i> <u>Panel Discussion</u> – Melanie Mendiola, CEO/Administrator, Guam Economic Development Authority, Gerry Perez, Ph.D., Vice President, Guam Visitors Bureau, and Artemio “Ricky” Hernandez, Ph.D., CGFM, IAP, CPPO, Deputy Executive Manager, Guam International Airport Authority
1:30 pm – 1:40 pm	PM Networking Break 1
1:40 pm – 3:00 pm <i>Somnak Ballroom</i>	PM Breakout Sessions (1.5 CPEs) <i>Government Accounting and Auditing Updates (Accounting – Governmental)</i> Rizalito Paglingayen, CPA, Partner, Ernst & Young
<i>Unnai 1 & 2</i>	<i>Project Management Fundamentals: How can project management be applied in Finance Operations? (Management Services)</i> Jojo B. Guevara III, MBA, CGFM, PMP, Financial Affairs Controller, Port Authority of Guam
<i>Unnai 3</i>	<i>Business Process Assessment: When Do You Replace Your ERP/Accounting System? Factors to Consider and Implementation Guidelines (Information Technology)</i> Melvyn K. Kwek, CISA, GICSP, Chief Information Technology Officer, Guam Power Authority
3:00 pm – 3:20 pm	PM Networking Break 2
3:20 pm – 5:00 pm <i>Somnak Ballroom</i>	PM Plenary Session (2 CPEs – Personal Development) <i>Managing Hybrid Teams – Let’s Identify and Assess your MBTI Type</i> John J. Rivera, Ph.D., L5, AIF, CFE, CM, SHRM-SCP, SPHRi, KSS, Director of Human Resources and Corporate Development, Citadel Pacific Ltd.

DAY TWO END



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AGENDA

DAY THREE: Friday, February 10, 2023

7:00 am – 5:00 pm
Foyer of Somnak Ballroom

Registration

8:00 am – 9:50 am
Somnak Room

AM Plenary Session (2 CPEs – Finance)

Long Term Financial Materiality and Investment Implications of Climate Transition

Maggie Ralbovsky, CFA, Managing Director, Wilshire and Artemio “Ricky” Hernandez, Ph.D., CGFM, AIF, Treasurer and Investment Committee Chairperson, Government of Guam Retirement Fund

9:50 am – 10:10 am

AM Networking Break

10:10 am – 12:00 pm

AM Breakout Sessions (2 CPEs)

Somnak Ballroom

Corporate Social Responsibility, Green Growth, and Creating a Sustainable Future for Guam (Specialized Knowledge)

Panel Discussion – Austin Shelton III, Ph.D., Director, University of Guam Center for Island Sustainability and Sea Grant and Abby Crain, Guam Green Growth Circular Economy Coordinator and Small Business Owner

Unnai 1 & 2

Do You Have a Succession Plan in Your Finance Department? A Guide to How to Strategize (Personnel/Human Resource)

Daphne Leon Guerrero, SHRM-SCP, CAPM, Human Resources Director, Atkins Kroll Inc.

12:00 pm – 12:20 pm

Lunch Networking Break

12:20 pm – 1:30 pm
Somnak Room

Lunch Plenary Session (1 CPE – Economics)

The Growing Economic Challenges and Opportunities in Micronesia

Roseann M. Jones, Ph.D., Interim Dean and Professor of Economics, School of Business and Public Administration, University of Guam

1:30 pm – 1:40 pm

PM Networking Break 1

1:40 pm – 3:00 pm

PM Breakout Sessions (1.5 CPEs)

Somnak Ballroom

Fundamentals of Municipal Bonds (Bonds 101) (Finance)

Sean Keatts, Director – Public Finance, Barclays Capital and Jane LePham, Director – Public Finance, Barclays Capital

Unnai 1 & 2

CPA Evolution and its Impact in the Accounting Profession and Academia (Accounting)

Billy Morehead, Ph.D., CPA, CGFM, Past-President, AGA National

Unnai 3

Tax Updates for Corporations and Individuals in 2023 (Taxes)

Martha G. Suez-Sales, DBA, CPA, CGMA, Assistant Professor of Accounting, University of Guam

3:00 pm – 3:20 pm

PM Networking Break 2

3:20 pm – 5:00 pm
Somnak Room

PM Plenary Session (2 CPEs – Personnel/Human Resource)

From Great Resignation to Great Reset – Insights on Surviving and Leading the Workplace

Daphne Leon Guerrero, SHRM-SCP, CAPM, Human Resources Director, Atkins Kroll Inc.

DAY THREE END