

Endorsed by



OKLAHOMA
TRIBAL FINANCE CONSORTIUM

ONLINE INTRODUCTORY TRIBAL FINANCE AND ACCOUNTING

◆ CERTIFICATE PROGRAM ◆

January — March 2021



ONLINE *BLENDED* LEARNING

- Learn on your own time and set hours convenient to your schedule.
- Eight-week cohort program gives you the ability to connect with other tribal peers.
- Gain knowledge and experience to help you become a more effective tribal finance/accounting professional and leader.
- Interact with and learn from other tribal finance/accounting professionals throughout the state and beyond.
- Zoom chat room for discussion and questions about course material at the end of each week.

Who should attend:

- Entry-level employees in tribal financial positions.
- Professionals who need to acquire increased knowledge regarding tribal finance and accounting (i.e. accountants, lawyers, bankers, etc.).
- Elected tribal officials and leaders who wish to better understand the financial side of a business decision.

Participants should plan on dedicating 5 hours per week on course instruction.

*Winner of the 2019 University Professional and Continuing Education Association (UPCEA) Central Region Outstanding Noncredit Program Award, the 2020 UPCEA National Outstanding Noncredit Program Award, and the 2019 Conference on Management and Executive Development (CMED) Peer Choice Best Custom Program Award.

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AGENDA

Week 1 (January 11-15)

Program Welcome

Rachel Domnick, Instructor of Professional Practice, School of Accounting, Spears School of Business, Oklahoma State University, Stillwater, OK

Oklahoma Legal Distinctions

Wilda Wahpepah, Special Counsel, Sheppard Mullin, Washington, DC

Theme: Introduction to Tribal Law

CPE: Business Law

Ethics for Accounting and Finance Professionals

Rachel Cox, MS, CPA, Instructor of Professional Practice, School of Accounting, Oklahoma State University, Stillwater, OK

Theme: Safeguarding the Tribe

CPE: Regulatory Ethics

Zoom Q&A Session with Week 1 Instructors - Friday, January 15 at 11:00 a.m. CST

Week 2 (January 18-22)

Introduction to Tribal Government Accounting & Finance

Corrine Wilson, CPA, Principal, REDW, Phoenix, AZ

Theme: Introduction to Tribal Finance and Accounting

CPE: Accounting (Governmental)

Internal Controls & Compliance, Fraud Protection

Danny Martinez, Managing Director, BKD, LLP, Dallas, TX

Theme: Safeguarding the Tribe

CPE: Accounting

Preparing Budgets

Rachel Domnick, Instructor of Professional Practice, School of Accounting, Spears School of Business, Oklahoma State University, Stillwater, OK

Theme: Essential Topics

CPE: Accounting

Zoom Q&A Session with Week 2 Instructors - Friday, January 22 at 11:00 a.m. CST

Week 3 (January 25-29)

Overview of Government Accounting

Michael Madsen, Senior Manager, BKD, LLP, Tulsa, OK

Theme: Introduction to Tribal Finance and Accounting

CPE: Accounting (Governmental)

Auditing Processes and Regulations/Preparing for an Audit

Patty Wetz, CPA, Senior Manager, Baker Tilly Virchow Krause, LLP, Austin, TX

Theme: Safeguarding the Tribe

CPE: Auditing (Governmental)

Zoom Q&A Session with Week 3 Instructors - Friday, January 29 at 11:00 a.m. CST

Week 4 (February 1-5)

Importance of Finance and Overview of Tribal Financial Statements

Patty Wetz, CPA, Senior Manager, Baker Tilly Virchow Krause, LLP, Austin, TX

Theme: Introduction to Tribal Finance and Accounting

CPE: Finance

Effective Record Keeping at Your Tribe

Corrine Wilson, CPA, Principal, REDW, Phoenix, AZ

Theme: Grants and Compliance

CPE: Accounting

Zoom Q&A Session with Week 4 Instructors - Friday, February 5 at 11:00 a.m. CST



ONLINE INTRODUCTORY TRIBAL FINANCE AND ACCOUNTING CERTIFICATE PROGRAM



AGENDA *continued*

Week 5 (February 8-12)

IRS Tribal Government Tax Guide

Corrine Wilson, CPA, Principal, REDW, Phoenix, AZ

Theme: Safeguarding the Tribe

CPE: Taxes

Cost Principles for Tribes

Corrine Wilson, CPA, Principal, REDW, Phoenix, AZ

Theme: Grants and Compliance

CPE: Accounting

Zoom Q&A Session with Week 5 Instructors - Friday, February 12 at 11:00 a.m. CST.

Week 6 (February 15-19)

Federal General Uniform Administrative Requirements

Corrine Wilson, CPA, Principal, REDW, Phoenix, AZ

Theme: Grants and Compliance

CPE: Accounting (Governmental)

Closing out Grants

Corrine Wilson, CPA, Principal, REDW, Phoenix, AZ

Theme: Safeguarding the Tribe

CPE: Accounting (Governmental)

Zoom Q&A Session with Week 6 Instructors - Friday, February 19 at 11:00 a.m. CST.

Week 7 (February 22-26)

Introduction to Federal Indian Law

James Nichols, Senior Attorney, Dorsey & Whitney, LLP, Minneapolis, MN

Theme: Introduction to Tribal Law

CPE: Business Law

Best Administrative Grant Practices and Compliance from Tribes

Alex Hontos, Partner, Dorsey & Whitney, LLP, Minneapolis, MN

Theme: Grants and Compliance

CPE: Accounting (Governmental)

Zoom Q&A Session with Week 7 Instructors - Friday, February 26 at 11:00 a.m. CST.

Week 8 (March 1-5)

Indirect Cost Rate Calculation and Negotiation Process

Scott Huebert, Partner, Finley & Cook, Shawnee, OK

Theme: Grants and Compliance

CPE: Accounting

SEFA – Schedule of Expenditures of Federal Awards

Becky Carter, Accounting Manager, Finley & Cook, Shawnee, OK

Theme: Grants and Compliance

CPE: Auditing (Governmental)

Zoom Q&A Session with Week 8 Instructors - Friday, March 5 at 11:00 a.m. CST.

Earn up to 45.6 CPE Credit

*****Pending NASBA Approval: CPE credit is pending final approval and CEU credit is available.*****



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January - March 2021

Online Blended Learning

<https://business.okstate.edu/cepd/open-enrollment/pds/tribal-finance-and-accounting-institute.html>

Name: _____

Title: _____

Company/Affiliation: _____

Address: _____

City: _____ State: _____ Zip: _____

Email: _____ Phone: _____

Number of years in current position _____ yrs.

Number of years at your current organization _____ yrs.

\$2,000

(Registration includes digital instruction, materials, and certificates) One copy of the Financial Reporting and Information Guide for Tribal Governments and Their Enterprises (Orange Book) as published by the Native American Financial Officers Association will be distributed as part of the registration fee to each participant.

\$75 Yes, I would like to enroll in the OSU Introductory Tribal Finance and Accounting Institute.

I understand there is a one-time application fee of \$75. By enrolling in the Institute, I will plan to complete 52 total hours of education in business topics—Tribal Leadership Certificate Program and Tribal Finance and Accounting Certificate Program over a two-year period..

Payment Information:

A check payable to Oklahoma State University is enclosed for the amount of \$_____.

If paying by credit card, please fax registration form to 405-744-6143 or call 405-744-5208.

Charge \$_____ to my [] Visa [] MasterCard [] American Express

Card No. _____ Exp. Date: _____

Security Code: _____ Billing Zip Code: _____

The Center for Executive and Professional Development, Oklahoma State University, is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

Please mail this registration form and check to:

Center for Executive and Professional Development
Spears School of Business | Oklahoma State University
294 Business Building
Stillwater, OK 74078-4011

Cancellation Policy:

Cancellations must be received within 10 business days prior to the start of the program. No refunds will be given after this time.

Call: 405-744-5208 | Fax: 405-744-6143 | E-mail: cepd@okstate.edu | Web: cepd.okstate.edu