

**NYSATRC
2023
TAX TRAINING SEMINAR
PROGRAM**

**THE HOTEL ITHACA
ITHACA, NY
222 SOUTH CAYUGA ST
WWW.THEHOTELITHACA.COM
607-272-1000
JUNE 11-14, 2023**

*We have a full program – so PLEASE be prompt to all sessions so
that we can stay on schedule!!!*

SUNDAY - JUNE 11, 2023

3:00 – 5:00 PM

**REGISTRATION/CHECK IN
Lobby**

5:30 -7:00

**WELCOME RECEPTION
Hors d'oeuvres
Cash Bar**

- **Skaneateles/Owasco Rooms (aka North Ballroom)**
Dinner is on your own tonight!
Enjoy Ithaca Commons – there is a lot to explore within walking distance of the hotel!

Please note:

- **All meals/break snacks and Tuesday dinner gala will be in the Skaneateles/Owasco Rooms (aka North Ballroom)**
- **All training/seminar presentations will be in the Ithaca/Cayuga Rooms (aka Grand Ballroom)**
- **You must have your name badge and meal ticket with you at all times during the seminar programming and you must also have your appropriate day/meal ticket with you to submit before entering into all breakfast, lunch and dinner buffets.**

MONDAY - JUNE 12, 2023

7:30 – 8:30 am **BREAKFAST BUFFET - Skaneateles/Owasco Rooms (aka North Ballroom)**
8:30 – 9:00 am **OPENING CEREMONIES - Ithaca/Cayuga Rooms (aka Grand Ballroom)**

WELCOME: JAMIEE ROSS, NYSATRC, PRESIDENT

INTRODUCTION OF:

- EXECUTIVE BOARD
- TAX SERVICE ORGANIZATIONS
- EXHIBITORS

9:00 – 10:15 am **BANKS – SUPPORT FOR OUR TAX COLLECTION EFFORTS**
Scott Keenan and Liz Cartini, Vice President's-Cash Management
TOMPKINS TRUST COMPANY
Brent Vincent, Michael Lumb, Darren Trainer, ELAVON

Presiding: Debby Kelley, Town of Ithaca

How lucky are we to have a local bank come in to talk to us about
Remote Depositing, Use of Lockbox and Fraud Protection?

10:15-10:30 am **BREAK**

10:30 – 11:30 **LEGAL UPDATE – WHAT'S NEW IN OUR NEW YORK TAX RECEIVERS AND COLLECTORS WORLD**

KATIE HODGDON, SPECIAL COUNSEL, AOT

Presiding: Jamiee Ross, Town of Thurman

11:30 – 12:30 **LEGISLATIVE UPDATE**

JOSEPH GERBERG, COUNSEL, NYS Real Property Services

Presiding: Holly Perlowitz, Town of Ossining

12:30 – 1:30 pm **LUNCH BUFFET - Skaneateles/Owasco Rooms (aka North Ballroom)**

1:30 – 2:15 **ROUNDTABLE WITH OUR TSO'S- WHAT IS AHEAD WITH INCREASING AUTOMATION AND WHAT IS AVAILABLE NOW!!!**

KELLY RENFROW, WELLS FARGO; JESSICA HARTWELL, CORELOGIC;
BRIAN DOWNEY, LERETA

Presiding: Lillian Dibble, Windsor-CSD

2:15-2:30 **BREAK**

2:30- 4:15 **Q&A WITH KATIE AND JOE**

KATIE HODGDON, SPECIAL COUNSEL, AOT

JOSEPH GERBERG, COUNSEL, NYS Real Property Services

Bring your questions – Katie and Joe are ready to respond or will get you
the answers you need!!!

Presiding: Holly Perlowitz, Town of Ossining

Dinner is on your own tonight! Continue to Explore and Enjoy Ithaca

TUESDAY - JUNE 13, 2023

7:30 – 8:30 am **BREAKFAST BUFFET - Skaneateles/Owasco Rooms (aka North Ballroom)**
8:30 – 9:00 am **ASSOCIATION BUSINESS MEETING/NOMINATIONS &
ELECTION OF OFFICERS – Ithaca/Cayuga (aka Grand Ballroom)**

9:00 -10:15 am **INTERNAL CONTROLS FOR CASH RECEIPTS AND TAX
COLLECTION**
 WILLAM NAYLOR, OFFICE OF THE STATE COMPTROLLER
 Presiding: Holly Perlowitz, Town of Ossining

10:15 - 10:30 **BREAK**

10:30 – 11:15 **RECORDS RETENTION AND WHAT DOES OSC LOOK FOR IN
AN AUDIT**
 MICHAEL MARTIN, Records Advisory Officer, NYSED
 Presiding: Lynn Buchanan, Town of Guilderland

11:15- 12:30 **NYS RETIREMENT SYSTEM – Online Tools available to you –
Bring your questions!!!**
 DANIEL HANS, Information Representative
 Presiding: Virginia Ignatowski, Town of Chili

12:30 – 1:30 pm **LUNCH BUFFET - Skaneateles/Owasco Rooms (aka North Ballroom)**

1:30 – 2:15 pm **NAVIGATING A FIRST AMENDMENT AUDIT**
 KATIE HODGDON, Special Counsel, AOT
 Presiding: Jamiee Ross, Town of Thurman

2:15– 2:30 pm **BREAK**

2:30-4:30 pm **FOCUS AS A PATHWAY TO SUCCESS AND HAPPINESS**
 UMA GUPTA, Leadership Development Consultant
 Presiding: Virginia Ignatowski, Town of Chili

Dinner Gala – Skaneateles/Owasco Rooms (aka North Ballroom)

The Town of Ithaca welcomes you to come looking **GORGE-ous!!!!**

6:00 pm – 10:00 pm

Music by Elephant Sounds

7:00 pm – 10:00 pm
WEDNESDAY - JUNE 13, 2023

- 7:30 am – 8:30 **BREAKFAST BUFFET** -Skaneateles/Owasco Rooms (aka North Ballroom)
- 8:00 am – 8:45 **EXECUTIVE BOARD Business Meeting – Boardroom**
Executive Board Members attending the meeting- Please bring Breakfast from the Breakfast Buffet so you can be on time to the Executive Board Business Meeting
- 8:45 – 9:45 am **Round Table with NYSATRC’s Officers and Directors - Ithaca/Cayuga Rooms (aka Grand Ballroom)**

Departure – Check-out is NOON – Plan Accordingly

Thank you 2023 Exhibitors

**CORELOGIC
OFFICE OF THE STATE CONTROLLER**

Thank you 2023 Sponsors

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OFFICE OF THE STATE CONTROLLER

GOLD SPONSOR

**ATC TAXES
ABSOLUTE AUCTIONS**

BRONZE SPONSOR

CORELOGIC

*Please put your evaluation sheet on the front table.
Thank you in advance – they are so helpful to us when we plan future events.*

