



# Annual Accounting Update & Winter Social

## McLaren Bay's Lincoln Center Lecture Hall

820 S Lincoln St

Bay City, MI

Friday, January 27, 2017

### **FASB and A&A Update by Plante Moran's presented by Plante Moran's Lindy Beldyga and Carolyn Obrecht**

What has FASB been up to? Learn about recent and upcoming accounting pronouncements and how they impact your organization.

### **Key Compliance issues for Accounting presented by McLaren's Heather McAllister**

What does Accounting need to know about Compliance? This session will discuss some key areas that all Accounting departments should know to keep their organizations Compliant.

### **Fraud Happens by Plante Moran's Michelle McHale and Amanda Fletcher**

The presenters will share tips for preventing and detecting fraud within organizations using actual case study examples.

### **Leader's as Teachers presented by McLaren's Patricia Hatcher**

Leaders wear several hats in our organizations and one of those hats is as teacher. This discussion will focus on the Leader as Teacher and the impact on culture, compliance, growth and learning. We will discuss the benefits of the leader as teacher for the leader, the learner and the organization.

### **Employee Benefits by Plante Moran's Laura Taylor and Zac Laumer**

What should your organization be concerned with related to employee benefits? Learn about DOL and IRS hot topics including DOL deposit requirements for employee deferrals and loan payments, 5500 filing requirements, fiduciary requirements, overall retirement plan compliance and 457 regulation changes.

### **Schedule**

08:00 AM	Registration
08:30 AM	Session 1
09:30 AM	Session 2
10:30 AM	Break
10:45 AM	Session 3
11:45 AM	Lunch with Staff Development session
01:00 PM	Session 4
03:00 PM	Meet at Kokomo's

## About the presenters:

### **Lindy Beldyga, CPA, Senior Associate**

Lindy has 14 years of experience providing auditing and consulting services to the healthcare and not-for-profit industries. Lindy is dedicated to serving multi-hospital systems, community hospitals, long-term care providers, and religious entities. Additionally, she has expertise with compliance audits of federally funded programs. She provides a wide range of audit services along with assisting in due diligence projects for merger and acquisition opportunities and general business consulting to hospitals and health systems. Lindy is a member of our healthcare professional standards team, which provides staff and clients with guidance and other information on new and proposed professional standards, consultations, and research as to the application of accounting and auditing standards for issues, and pre-issuance reviews of financial and other attestation reports.

### **Carolyn Obrecht, CPA, Associate**

Carolyn has over seven years of experience in public accounting and has focused on the healthcare and employee benefit plan industries for the majority of her career. Carolyn has served health care entities structured in a variety of fashions including multi-hospital health systems, community hospitals and long-term care facilities, both not-for-profit and government owned.

### **Heather McAllister, RHIA**

Heather has spent all 29 years of her healthcare career in the Bay system. She started at McLaren Bay in 1988 as a Clerk in Bay Region's Health Information Department. After obtaining her Bachelor's Degree in Health Information Science, she spent 21 years at McLaren's Long Term Acute Care Hospital as their Health Information Manager. Her responsibilities included oversight of all medical record functions, concurrent and discharge inpatient coding, quality and peer review activities, completion of statistical reports and CMS mandatory quality reporting. She also acted as their Privacy and Compliance Officer. Last December she assumed the role of McLaren Bay Region's Director of Regulatory Compliance and is currently preparing for Compliance certification.

### **Michelle D. McHale-Adams, CPA/CFF, CFE, Partner**

Michelle has over 20 years of experience in forensic accounting and is Plante Moran's Forensic Accounting Practice Leader. She has conducted numerous interviews, located and reviewed key documents, analyzed numerous financial records, traced assets, and quantified the financial losses for many clients in different industries. She has assisted counsel in discovery matters and has testified at trial regarding forensic accounting findings. She has helped organizations prepare economic loss claims that are filed with insurance companies for a variety of claims. Michelle has also provided financial consulting services for many large and small entities related to performing numerous Fraud Risk Assessments whereby vulnerable areas of the controls over cash are identified. These services have spanned many different industries, including the government sector. Michelle is the former Chair of the Michigan Association of Accountants' Fraud Task Force and is a frequent presenter on the topics of forensic accounting and internal controls.

### **Amanda Fletcher, CPA, CFE, Senior Consultant**

Amanda is a member of Plante Moran's Forensic Investigative Services Group. She has worked on expense reviews, asset misappropriation investigations, internal control assessments, and insurance claims. She has participated in interviews, performed financial analyses, conducted investigative research, and reviewed accounting records. Amanda has also analyzed data to discover trends in expenses and detect fraud. She has received extensive training in data analytics software.

### **Patrice M. Hatcher, MSA, FACHE**

Patrice is a Corporate Leadership Development Consultant at McLaren Health Care Corporation in Flint, Michigan. She is a Registered Medical Technologist and worked in the clinical laboratory at McLaren for 11 years. Pat joined the Educational Resources and Development Department in 1995 where she worked with staff and leadership development. In 2002 she moved into the Leadership Development Department. Pat has earned a Bachelor's of Science in Biology from the University of Michigan – Flint, a secondary teaching certificate in Biology and Chemistry from UM-F and a Master's in Health Service Administration from Central Michigan University. In 2008 Pat became board certified in Healthcare Management and a Fellow of the American College of Healthcare Executives. She is a certified facilitator for the 7 Habits of Highly Effective People, The Oz Principle of Accountability, Crucial Conversations, Crucial Accountability, Influencer, Change Anything, Project Management Essentials, Situational Leadership and Inspiring Trust. These are all programs offered by the Leadership Development Department at McLaren Health Care. In 2013, 14 & 15 she was awarded Platinum status in the Elite Trainer program from VitalSmarts. Pat serves as President for the Board of Education for the Carman-Ainsworth Community Schools and on several School District Committees. She has received Master Platinum Award from the Michigan Association of School Boards. Patrice is a Lecturer for the University of Michigan-Flint and an adjunct faculty for Michigan Association of School Board Members. She also serves on the Board of the Great Lakes Chapter of the American College of Healthcare Executives and as the Education Chair.

**Laura Taylor, Employee Benefits Consultant, Senior Manager**

Laura is a senior manager in our Employee Benefits Consulting group with more than 10 years of experience. She is a firm-wide technical leader for reporting and compliance issues related to qualified retirement and health and welfare benefit plans. Her practice includes preparation and review of Forms 5500 and 8955-SSA, design, administration, and assistance with compliance issues associated with qualified retirement plans. She has lead internal and client training regarding Form 5500 and Form 5500 Schedule C issues.

**Zac Laumer, Consultant**

Zac is a consultant in our Employee Benefits Consulting Group and a licensed attorney. Zac's has experience working with a wide range of financial, manufacturing, service, governmental and not-for-profit entities. Specifically, Zac's experience includes consulting on best practices and federal regulations related to qualified retirement plans and non-qualified deferred compensation arrangements.

## **2017 WINTER SOCIAL**



**WHERE: Kokomo's  
5200 Kokomo Dr  
Saginaw, MI 48604**

**WHEN: 3:00 – 6:00 PM**

**Dinner will be provided at this fun networking event including laser tag and arcade style games!**

**Winter 2017 Social and Education Event**

**Friday, January 27, 2017**

**McLaren Bay Lincoln Center Conference Center, Bay City, MI**

**Registration Rates: \$40 Members, \$50 Non-members (includes Kokomo's)**

Please Make Checks Payable to: **Great Lakes Chapter HFMA** or pay with **PayPal** using this link:  
(control+click to follow link) [http://www.greatlakeshfma.org/site/epage/4367\\_262.htm](http://www.greatlakeshfma.org/site/epage/4367_262.htm)

**Click on the "Buy Now" button.**

**Registrations must be received by January 20, 2017. No refunds will be issued for cancellations received after January 20, 2017**

Mail, fax or scan & email to: Attention: Wyatt Short  
The Rybar Group  
3150 Owen Road  
Fenton, MI 48430-1757  
Fax: 810-750-6733  
Email: [costrpt@theybargroup.com](mailto:costrpt@theybargroup.com)

*In our continuing effort to "go green", handouts will not be available at the meeting. They will be e-mailed to you one week before the meeting. You **MUST** provide an email address below to receive the handouts.*

Name <i>as it will appear on badge</i>	Email Address and Organization	Cost	Chapter Affiliation	Attending Kokomo's? (Y or N)
			<input type="checkbox"/> Great Lakes <input type="checkbox"/> Western MI <input type="checkbox"/> Eastern MI <input type="checkbox"/> Other Chapter <input type="checkbox"/> Non Member	
			<input type="checkbox"/> Great Lakes <input type="checkbox"/> Western MI <input type="checkbox"/> Eastern MI <input type="checkbox"/> Other Chapter <input type="checkbox"/> Non Member	
			<input type="checkbox"/> Great Lakes <input type="checkbox"/> Western MI <input type="checkbox"/> Eastern MI <input type="checkbox"/> Other Chapter <input type="checkbox"/> Non Member	
			<input type="checkbox"/> Great Lakes <input type="checkbox"/> Western MI <input type="checkbox"/> Eastern MI <input type="checkbox"/> Other Chapter <input type="checkbox"/> Non Member	