



# ASMC CLEVELAND TIMES

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### Save the Date:

ASMC Winter Social is TBD.  
A Winter Social e-mail will be out soon!

January Luncheon is TBD. A luncheon e-mail will be out soon!

### Future Meeting Announcements:

ASMC Board Meeting on Wednesday January 31, 2018 at 3:00 pm in room 2911G.

"Disclaimer: The ASMC Times is the newsletter of the Cleveland Chapter of the American Society of Military Comptrollers. Views expressed herein do not necessarily reflect those of federal agencies. We reserve the right to edit submissions for content, length, grammar and spelling."

## PRESIDENT'S MESSAGE



Hello and welcome to the start of another year. While many of us will focus on traditional resolutions like eating healthier and exercising more, instead consider focusing your efforts on improving your financial health in 2018. No matter what your financial acumen level is, re-examining your saving, spending and investing patterns is a key for success and achieving both your short-term and long-term goals. According to Rule #1 Investing, the following list should be used as a basis for financial well-being:

- Assess Your Financial Health
- Set a Realistic Budget and Stick to it
- Pay off Your Debt
- Plan for Retirement

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## President's Message (cont.)

- Stay Organized and Track Your Progress
- Establish an Emergency Fund
- Review Your Investment Accounts

I leave you with this famous quote by American Businessman, Warren Buffett:  
"Someone is sitting in the shade today because someone planted a tree a long time ago."

I wish all of you a healthy and happy 2018. Thank you for being a member of the ASMC-CL Chapter.

-John



## NATIONAL NEWS

### ASMC National News

*As 2017 comes to a close, we want to wish each of you a joyous holiday season!*

Thank you so much for your membership in ASMC and for your contributions to our defense financial management profession and to our nation.

Government organizations continue to strengthen firewalls, so it is imperative that our members designate their personal email address in their member profile, to ensure timely receipt of ASMC communications. [Read more here!](#)

[Achievement Award Nominations due January 31](#)

[November 2017 Membership Renewal Campaign Winners](#)

See more Defense and Budget Financial Management Highlights on the ASMC website ([www.asmc.org](http://www.asmc.org))



#### CDFM

The CDFM remains a prestigious credential, as only 14% of the 54,000 defense financial managers currently possess it; only 3% also possess the CDFM-A (Acquisition) credential. For those of you considering pursuit of the CDFM, I urge you to take the steps to achieve this goal now! The demands of the fiscal environment over the past few years certainly indicate that knowledge and analytical skills across the range of FM disciplines is beneficial. The CDFM certification is fundamental to establishing a broad set of financial management skills. It also enables DoD and USCG leaders to be confident in hiring CDFMs or CDFM-As, knowing they have demonstrated initiative and drive in achieving a certification focused upon knowledge and skills directly applicable to requirements of positions within our profession.

Now that the DoD FM Certification Program (DFMCP) has reached its first major milestone and over 32,000 FMers have achieved it, the shift from earning to maintaining the certification has begun. As a reminder, the DFMCP "recommends" and "strongly recommends" that FMers at Level 2 and Level 3 respectively, also obtain a "test-based" certification. The CDFM is among the group of test-based certifications recognized by the DFMCP, and, obviously it is the certification most closely related to the profession of defense financial management. Achieving a test-based certification and maintaining mandatory CPEs, are key-stones of demonstrating professionalism and commitment to high standards.

Whether you are at the journeyman level or an experienced defense financial manager, the CDFM Certification Program offers the type of recognized and prestigious credential that remains relevant, provides a solid foundation supporting professional development, identifies you as an individual with the initiative to enhance your skills, distinguishes you as a respected professional with knowledge across all areas of defense financial management, and increases your employment opportunities within the public and private sector.

## CDFM INFORMATION



### Module Frequently Asked Questions about the Certified Defense Financial Management Exam

**Q: What steps do I have to take in order to enroll for the CDFM exam?**

A: You may enroll for the exam online, or by mailing the paper CDFM Enrollment form to ASMC Headquarters. If you are an ASMC member, you may complete the paper CDFM Enrollment form and send it to Jason Ward at Jason.L.Ward53.civ@mail.mil. After your application is accepted, you will receive an Authorization Letter or email from ASMC with your candidate ID number and the procedures to follow in registering for the modules examinations. Enrollment forms may be found at the following website: [www.asmc certification.com/certification/cdfmforms/program-enrollment](http://www.asmc certification.com/certification/cdfmforms/program-enrollment)

**Q: How long do I have to pass the CDFM exam?**

A: You will have two years from the date of your Authorization Letter to complete the three module examinations required for the CDFM Program. There is a fourth, OPTIONAL module that if taken and passed, you will earn a CDFM with an acquisition specialty (CDFM-A).

**Q: Do I have to take all three modules at the same time?**

A: No. You may take module examinations one at a time, in any combination, or in any order.

**Q: What is the difference between the CDFM, CGFM and the Federal Financial Management Certificate Program?**

A: ASMC offers the CDFM program to persons interested in displaying proficiency in the core aspects of defense financial management. The CGFM is more applicable to general government financial management – federal, state and local. The Federal Financial Management Certificate Program is offered through Management Concepts and involves taking a variety of courses in order to complete.

**Q: What are the benefits of obtaining a CDFM?**

A: The Under Secretary of Defense, Robert F. Hale (CDFM) says “earning a CDFM proves that an employee has obtained the knowledge and experience to become certified and adhere to a code of ethics and professionalism.” Additionally, the CDFM may:

- set you apart from others
- lead to career advancement
- give you the opportunity to serve in leadership positions

**Q: Is it required to take the Enhanced Defense Financial Management Training Course (EDFMTC) in order to sit for the CDFM exam?**

A: No, however, the course is a great way to prepare for the exam.

**Q: What are the best ways to prepare for the exam?**

A: The best way to prepare for the exam depends on your own personal studying methods. The Enhanced Defense Financial Management Training Course (EDFMTC) textbook is provided to those who attend the one-week training course. ASMC-Cleveland has two copies of the EDFMTC textbook that may be checked out by ASMC members.

## CDFM INFORMATION CONT.

**Q: Will passing the CDFM exam get me a promotion?**

A: No, a promotion is not guaranteed after passing the CDFM exam.

**Q: What are the educational requirements to sit for the exam?**

A: You must have a high school diploma or equivalent.

**Q: What is the financial management experience requirement to sit for the exam?**

A: You do not have to satisfy the experience requirement in order to sit for the exam. However, after you pass the exam, you must satisfy one of the following experience requirements BEFORE being issued your CDFM certificate: Complete 4 years of federal government related financial management experience (with an associate degree or higher) - OR- Complete 3 years of Defense related financial management experience (without a degree) -OR- Complete 2 years of Defense related financial management experience (with an associate, bachelor or higher degree).

**Q: If I do not have any financial management experience, can I still enroll in the EDFMT class?**

A: Yes.

**Q: What are the fees associated with obtaining and maintaining a CDFM?**

Enrollment Fee for Non ASMC Members	\$75.00
Enrollment Fee for ASMC Members	\$40.00
Extension of Enrollment Fee for Non ASMC Members	\$85.00
Extension of Enrollment Fee for ASMC Members	\$75.00
Module One Examination	\$99.00
Module Two Examination	\$99.00
Module Three Examination	\$99.00
Module Four Examination	\$99.00
Re-examination per module	\$99.00
Renewal of Certification (Every 24 months after obtaining CDFM)	\$25.00

**Q: How do I receive reimbursement for my CDFM Examination fees?**

A: You must first fill out a SF1164 with supervisor's signature in Block 8. Along with this form, verification of payment of the exam and verification of passing the exam must be emailed or faxed to [DFASCERTIFICATIONREIMBURSEMENT@DFAS.MIL](mailto:DFASCERTIFICATIONREIMBURSEMENT@DFAS.MIL) or 317-510-2116/2195.

**Q: Are CDFMs required to earn a certain amount of CPEs per year?**

A: CDFMs are required to renew their certification with ASMC every two years. CDFMs must complete at least 80 hours of CPE in every 2 year period once the certification has been issued.

**Q: As a CDFM, are you required to be a member of ASMC?**

A: Members who earned their CDFM are encouraged to maintain their membership with ASMC.

**Q: What is the latest version of the Enhanced Defense Financial Management Training Class Textbook?**

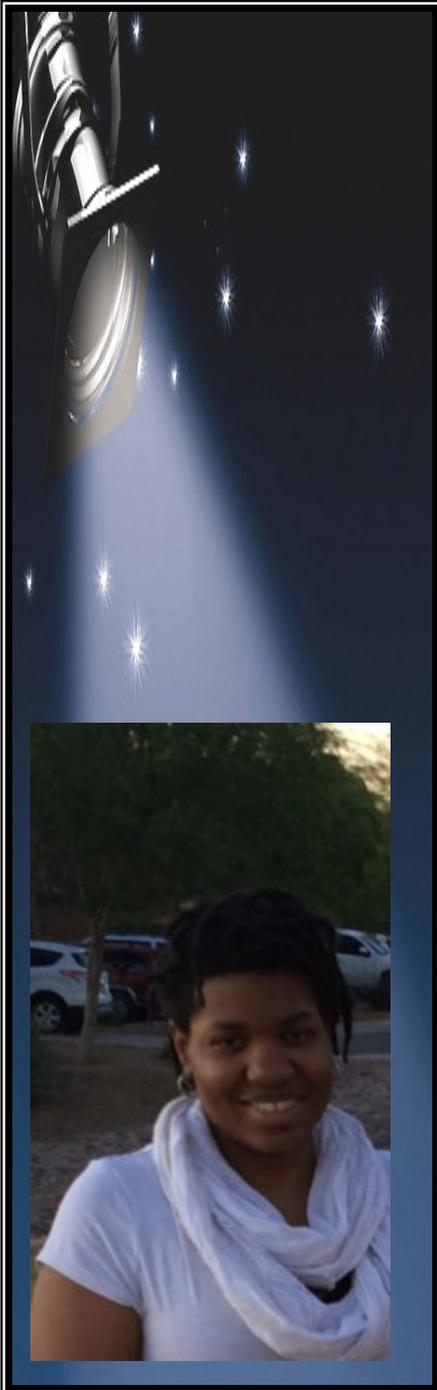
A: As of 2/29/2012, the latest version of Textbook for Module 1-3 is 2013A and for the Module 4 textbook is March 2011.

For more information, please email either Jason Ward at [Jason.L.Ward53.civ@mail.mil](mailto:Jason.L.Ward53.civ@mail.mil) or Kira Swanson at [Kira.Swanson.civ@mail.mil](mailto:Kira.Swanson.civ@mail.mil)

# Member News

## Member News

### MEMBER SPOTLIGHT - Katara Walker



By: Dan Goliat

#### Government/Military Background

When were you hired by DFAS and what was your position?

January 9, 2017

Accountant - Accounts Receivable

What is your current job and department?

Accountant - Accounts Receivable

#### Educational/Professional

Do you hold any degrees, certifications, etc. If so what have you earned?

BA in Accounting

What current projects, degrees, and/or certifications you are working towards?

Working towards CDFM

#### ASMC

When did you join? Why did you join? What is your position within ASMC?

I joined in October, 2017. Joined to network and build leadership skills

I am a member

#### Personal

What are your hobbies/interests?

Spending time with family and friends; baking/cooking; reading; writing

Do you have a favorite quote that you would like to share?

Stay humble, work hard, and be kind - unknown

## Member News

### WAGS 4 WARRIORS

Wags 4 Warriors has been selected as the designated charity for the ASMC Cleveland Chapter for the current program year. Our Chapter is proud to donate \$100 in the name of each luncheon speaker to support this tremendous cause.

The mission of WAGS 4 WARRIORS is to unite veterans whom upon returning home from war suffer with Post Traumatic Stress Disorder (PTSD) or Traumatic Brain Injury (TBI) with an appropriate dog, and to provide all of the training, equipment and support for the dog to become the veterans service dog at no cost to the veteran. The ultimate goal is for the service dog to take away the struggles the veterans face every day.

Wags 4 Warriors provides all of the training for the service dog, the cost of adoption fees, all equipment, routine veterinary care (vaccinations, spay/neuter, monthly heartworm and occasionally other veterinarian visits that are required for the year they are in training with Wags) and the costs associated with public access outing trainings. The estimated cost per veteran and service dog team is roughly \$5,000.

Once a veteran and dog are paired, they begin their training and must complete 120 hours at the Broadview Heights training facility and 60 hours of public access training at places including restaurants, malls, museums, zoos, VA hospital, etc. The service dog must learn a minimum of three tasks to perform for the veteran and they must pass the three phases of testing throughout the training. This process can take up to one year to complete.

Wags is a family-oriented organization, which has multiple family picnics and veteran outings throughout the year. For more information, please visit: <http://www.wags4warriors.org/>.



# Member News

## Member News

### Member News

Greetings members!

Please consider donating your time to support the IRS Volunteer Income Tax Assistance (VITA) program. Since 2005, the Enterprise-led Cuyahoga EITC Coalition, as part of the VITA program, promotes economic prosperity by helping low-income families make use of the earned income tax credit (EITC) and other asset building programs. The EITC is the largest, most effective poverty relief program in the country. It is designed to fill the gap between what low-wage workers earn and what is required to meet the basic needs of their families by providing an increase to their income with a refundable tax credit.

Our free, high-quality tax preparation offers hardworking families an alternative to paid preparers, many of whom assess high filing fees and expensive refund advancement products. With nearly 1 in 5 Cuyahoga County residents living in poverty, it is crucial that taxpayers receive all of the credits due to them and their entire refund, free of filing fees. The Coalition serves families, individuals and seniors from across the County at 25 tax preparation locations. Through client surveys, we know that these refunds are spent locally which benefits the community in which our clients live and work.

#### Volunteer Tax Preparer Summary:

Description: The beginner tax preparer prepares basic level tax returns.

Time Commitment: Tax Preparers are asked to make a twice per month commitment to a tax site. The length of a volunteer shift varies from 3-5 hours depending on the tax site.

Training: Beginner tax preparers can attend an in person or online training starting in December. All beginner tax preparers are required to pass an ethics test and basic tax law test prior to volunteering.

#### Steps to Become a Volunteer Tax Preparer:

1. Register for an account on Volunteer Hub. This is where you can register for in-person training events and tax-preparation events once you are certified.
2. There are 2 ways to complete training and testing:

\*In-Person Basic Training and Testing - Go online to register for one of our one day interactive tax preparation training events where you will learn basic tax law and the basics of using Taxwise, our tax preparation software, as well as take your Basic Tax Law certification exam. Coffee, snacks and lunch will be provided. Training events are held on Saturdays from 9 am - 4 pm.

\*Cuyahoga EITC Coalition Basic and Advanced Training Videos - Watch our easy to navigate video lessons. The video lessons can be found visiting our Information for Volunteers page and then clicking on "Online Training Modules" under Training Resources. Then complete your testing on the VITA/TCE Central website.

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# Member News

## Member News

3. Send us your 13615:

\*In-Person Exam - Once your exam is graded you will receive a confirmation email with directions to view your 13615 - Volunteer Standards of Conduct, which includes the volunteer agreement and your test scores. You will now be able to view and register for tax preparation events.

\*Online Exam - Once you complete your exam you will need to send us your 13615. To do so follow these simple instructions:

1. Login to VITA/TCE Central.
2. On the right hand side make sure you check the box "You may sign your Volunteer Agreement electronically by checking this box".
3. Below that you will see "Click here to open and complete your agreement".
4. Save and email a copy of your volunteer agreement to [volunteer@refundohio.org](mailto:volunteer@refundohio.org).
5. Once your exam is processed you will receive a confirmation email with directions to view your 13615 - Volunteer Standards of Conduct, which includes the volunteer agreement and your test scores. You will now be able to view and register for tax preparation events.

For complete details, please visit:

<https://www.refundohio.org/volunteer-today-1>

If you have questions, please contact:

Maggie Campbell: [mcampbell@refundohio.org](mailto:mcampbell@refundohio.org) Tax Site and Volunteer Support

Thank you,  
ASMC-CL Chapter Community Service

Hello members,

Please join ASMC on Thursday, January 18th to help those in need at St. Herman's House of Hospitality, just a short distance from DFAS in Ohio City. We will meet at 5:00 PM at St. Herman's located at 4410 Franklin Blvd in Cleveland. We will plate and serve meals, as well as clean dishes and tables afterwards, ending by 6:30 PM. St. Herman's is a small place that can accommodate only eight volunteers, so if interested, please email Jessica Huff at [jessica.l.huff20.civ@mail.mil](mailto:jessica.l.huff20.civ@mail.mil) so you can be added to the list.

Please consider joining in the 35 year tradition of serving the poor and homeless population in the Ohio City community.

Thank you,  
ASMC Community Service Committee



# Member News

## Member News

Did you know that the Cleveland Chapter of the American Society of Military Comptrollers (ASMC) provides educational scholarships? In conjunction with Kearney and Company, we are currently offering ONE \$1,000 scholarship and ONE \$500 scholarship to two Cleveland Chapter ASMC Members currently pursuing college degrees.

To be eligible, applicants must...

- Possess a minimum grade point average of 2.5 on a 4.0 scale.
- Be an active member of the ASMC Cleveland Chapter.

For more details about the scholarships, membership, and the benefits of being an ASMC member, visit the Chapter's website at <http://www.asmc-cleveland.org>. All scholarship applications must be submitted by close of business on Friday, February 9, 2018.

\*\*\* If you know a non-member who is attending college and may be interested in applying for a scholarship, this is the perfect opportunity for them to join the Chapter! \*\*\*

Greetings Members!

Are you looking to get involved? Are you looking to make a difference within the ASMC-CL Chapter? Are you looking to network? Look no further! The ASMC-CL Chapter has plenty of openings for current members to jump on board and get involved. There are current openings for the following positions:

- Corporate Sponsorship Committee
- Project Management Committee
- Military Liaison
- Luncheon Committee
- Marketing Committee
- Newsletter Committee

If you are interested in joining any of the committee teams listed above, please contact ASMC-CL Secretary Shana Rose at [shana.e.rose.civ@mail.mil](mailto:shana.e.rose.civ@mail.mil) for more information.

# Member News

## ASMC-CL Photo Gallery



ASMC-CL members at the Cleveland Chop Holiday Dinner on December 20th.



Keynote speaker Lou Ockunzzi with guests and ASMC-CL members before his presentation.

# Member News

## Member News

### ASMC-CL Photo Gallery (continued)



ASMC-CL members before the presentation.



More shots of the crowd before the presentation.



Mr. Ockunzzi receiving a Certificate of Appreciation for his great presentation entitled 'DFAS Strategy ~ Local Responses To Agency Goals.'

## ASMC BOARD MEETING MINUTES

### ASMC Board Meeting Minutes

January 5, 2018

Last Wednesday of the month, 3:00-4:00PM 2911G (Rescheduled due to Holiday break)

**Attendees:** John Giammo, Matt Pfarr, Kira Swanson, Lynn Zielaskiewicz

#### Nominations

Jessica will perform VP duties during maternity leave (tentatively starting at the end of February)  
The Nomination/Election timeline is tentatively as follows (i.e., flexible based on feedback from the board, particularly the Newsletter & VP of Programs, or if baby Ciccolini arrives ahead/behind schedule):  
Jessica sends draft nominations survey/e-mail to John & Elena for review/approval: Week of 2/19  
Secretary sends nominations e-mail/survey link to members: 3/2 or 3/5  
Nominations period open: 3/5-3/16  
Nominees notified of/accept nominations: by 3/23  
Nominees introduced at luncheon: Late March or early April  
Nominee bios due (for publishing in special edition of the chapter newsletter): COB on 4/6  
Newsletter special edition published: mid-April  
Voting (via survey): 4/23-5/4  
Elected Officers notified: by 5/11  
Elected officers announced to ASMC Cleveland Chapter members at the May 2018 Chapter Luncheon

Scholarships:  
Reminder sent to members on 1/4  
The Aloha Chapter reached out to several chapters, including Cleveland, to ask questions about our Scholarship Program. Jessica provided feedback and asked that they share best practices once they received feedback from other chapters.

CDFM:  
Module 1 Exam is scheduled for 1/16/18, 11 people have registered to take the exam.

#### Community Service

In addition to St. Herman, ASMC provides opportunities for volunteers to help out at the food bank every other month starting in January.  
Lynn & John dropped off the collections for the Cleveland Christian Hall in mid December

#### Treasurer

2<sup>nd</sup> Quarter Finance Report will be produced shortly.

ASMC - Cleveland Chapter

Finance Report

Chapter Year 2017/2018

First Quarter Report

July 1 2017 - September 30 2017

Earnings/ Receipts

Interest Earned	\$	41.68
Luncheons	\$	1,231.27
Social Events	\$	-
Conferences/Seminars	\$	-
Membership Rebates and Dues Collections	\$	-
Sponsorship	\$	-
Miscellaneous	\$	14.01
<b>Total</b>	<b>\$</b>	<b>1,286.96</b>

Expenses

Membership Dues & Subscriptions	\$	-
Luncheons	\$	1,433.26
Social Events	\$	34.49
Conferences/Seminars	\$	-
Gifts	\$	-
Office Expenses	\$	370.51
Charitable Contributions	\$	200.00
Promotional	\$	-
Miscellaneous	\$	133.98
<b>Total</b>	<b>\$</b>	<b>2,172.24</b>

Beginning Accounts Balance	\$	29,006.04
Petty Cash On Hand	\$	100.00
Add Earnings/Receipts	\$	1,286.96
Subtract Expenses	\$	(2,172.24)
<b>Ending Accounts Balance</b>	<b>\$</b>	<b>27,894.76</b>
<b>Ending Petty Cash</b>	<b>\$</b>	<b>326.00</b>
<b>Quarter End Balance</b>	<b>\$</b>	<b>28,220.76</b>

## ASMC CLEVELAND TIMES STAFF

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### Visit Us Online At:

<http://www.asmc-cleveland.org/>

ASMC Cleveland Chapter

<http://www.asmonline.org/>

ASMC National

## EXECUTIVE COMMITTEE

President	John Giammo
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Vice President—Programs	Lance Jones
Vice President—Nominations	Jessica Ciccolini
Treasurer	Matt Pfarr
Secretary	Shana Rose
Past President's Advisory Board	Lou Ockunzzi      Frankie Denmeade
	Jessica Ciccolini      Jason Denmeade
	Jaelyn Donadio      Bryan Conway

## COMMITTEE MEMBERS

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Membership Committee	Jim Caywood
Membership Committee	Jane Mullins
Membership Committee	Perlita Arnold
Membership Committee	Lucinda Holden
Membership Committee	Seung (Jay) Choi
Education/Scholarship Committee	Julie Coghlan
Education/Scholarship Committee	Kari Vescio
Education/Scholarship Committee	Kelsey Zifzal
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Treasurer Committee	Gerald Whitsett
Treasurer Committee	Kelsey Zifzal
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Luncheon Committee	Paul Cotton
Special Events Committee	Paul Cotton
Special Events Committee	Ashley Platko
Community Service Committee	Jessica Huff
Community Service Committee	Ryan Serne
Community Service Committee	Rechelle Williams
Community Service Committee	Frankie Denmeade
CDFM Committee	Kira Swanson
CDFM Committee	Brenda Banks-Hammonds
CDFM Committee	Jason Ward
Military Liaison Committee	Dominique Bray
Marketing Committee	VACANT
Local PDI	Lance Jones
Webmaster Committee	LCDR Brad Braunaugh

