



VOL. 11
ISSUE 1



AMERICAN SOCIETY OF MILITARY COMPTROLLERS

San Diego Chapter Newsletter

COMMUNICATOR

JANUARY
2018



CHECK THIS OUT!

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SAVE THE DATES!

Lunch & Learn Meetings:

February 21st

Location: Anchors & Spurs
Presenter: TBD
Charity: Fisher House

April 26th

Location: TBD
Presenter: TBD
Charity: TBD

FROM THE ADMINISTRATIVE VICE PRESIDENT:

Happy New Year!

We hope everyone had a safe and happy holiday season with your friends and family. Thanks to all who attended the annual December Toys for Tots luncheon and the informative presentation from Dr. Dale R. Geiger. Going into the New Year, we plan on continuing to provide you with good speakers and topics for our future lunch and learn events. As always, we encourage you to provide us with any suggestions that would be of interest to our members and the financial management community.

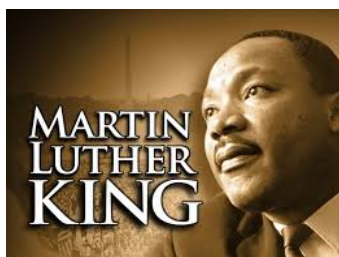
The New Year can bring new professional and personal goals and challenges. Maybe this is the year you are able to pursue your CDFM certification or pass the remaining module(s) you have remaining. Or, if obtaining additional college education or getting an advanced degree is in your plans, an ASMC local or National scholarship can help you achieve this goal. On an individual side, we usually have to make some personal sacrifices, life adjustments, and need additional mental or physical strength to get kick started in the right direction. Whatever goals you have envisioned and will pursue, we wish you success!

We look forward in seeing you at future lunch and learn and /or Chapter events throughout the year.

Thanks and best wishes to you,

Mike Ortiz

ASMC San Diego Chapter Admin Vice President
mike.ortiz@navy.mil



2004-2018 FIVE STAR CHAPTER





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ASMC San Diego 2017-18 Membership Drive:

Happy New Fiscal Year! I'm excited to be doing this new Membership Drive for ASMC San Diego. Let's make this our highest recruitment ever!

New Membership: The chapter will pay half your membership dues for the first year of any new member who joins ASMC between December 1, 2017 and September 30, 2018. This only applies to anyone who has never been an ASMC member in the past. You will need to submit a copy of your receipt for payment.

ASMC San Diego Members: Every time an ASMC member attends an ASMC luncheon and brings a non-ASMC member to that same luncheon the ASMC member will receive entry to the luncheon for half price.

Rules for the FY-2017-18 ASMC Membership Drive

This membership drive is open to all ASMC San Diego members in good standing. -- Members transferring from other chapters do not qualify as a "NEW" member and members renewing membership do not qualify.

If you have any questions, contact Brenda Meyer, who can be reached at (619) 553-1569 or brenda.meyer@navy.mil.

New FM Certification Training Opportunity!

BSO FM Approved Training

Navy Region Southwest is hosting BSO Approved FM Training at the Broadway Complex located at 937 North Harbor Drive San Diego, CA 92132-0058. Below provides information on the competency levels each training covers for DOD FM Certification, as well as CET's awarded.

Course Hours : 16 CET/CPE'S awarded for attending

Course # Days: 2

Course Name : Creativity and Innovation Training Course

DoD FM Certification Course Mapping Towards Earning Certification Level 3

16 hours lead organizations

Date 2-5-2018 to 2-6-2018

Please contact Ken Suazo at Kenneth.Suazo@navy.mil, 619-532-1099 for more information and to sign up for the class. Attendee reservation will be accepted on a first-come first-serve basis, until the class(s) is filled up. The class will be held at Navy Region Southwest, Bldg. 1. RBO Conference Room located on the 5th floor.



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Enhanced Defense Financial Management Training (EDFMT) Class

Centrally Funded courses:

HOST	DATES	LOCATION	# DON Seats	Available	Waits
Navy	January 29 - February 2, 2018	San Diego, CA	30	0	4
Navy	March 26-30, 2018	San Diego, CA	32	27	0
Navy	April 16-20, 2018	San Diego, CA	32	32	0

Sign up for the class: <https://www.atrrs.army.mil/edfmt/>

Open Enrollment courses:

*	June 4-8, 2018	San Diego, CA	unk	18	0
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* Grad School USA, FINC7060D001, Cost \$1,050.00

Sign up for the class:

<http://register.graduateschool.edu/modules/shop/index.html?action=section&OfferingID=178>

Module 4 locations (none local): <http://www.asmconline.org/educationtraining/classroom-training/>

EDFMT is a five-day, intensive financial management review course taught in three modules: accounting and finance, resource management environment, and budgeting and cost analysis. The class is targeted at GS-9 or higher in a 05XX occupational series. Other occupational series (including military) can apply, but priority will be given to students in the 05XX series.

Obtain supervisor approval prior to registering.

Course Hours: 40 CET/CPE'S awarded for attending

Number of seats available and other data current as of 9 Jan 18

We need SPEAKERS for our Lunch and Learn Meetings

We are always looking for speakers/trainers for our bi-monthly Lunch & Learn Meetings. If you are interested, know of a speaker you think would be excellent for a future event, or if you have a recommended training topic that you feel other members would also be interested in; please let us know your suggestions. Please contact Jacquie Yelder at jacqueline.yelder1@navy.mil.



Accountant Needed

Are you an Accountant and would you like to earn some extra money on the side? ASMC San Diego is looking for an Accountant within our ranks that would be willing to Audit our books around the November timeframe. Accountant does not need to be an ASMC member, so pass the word around. Any interested parties should contact, Reshi Constant, 619-524-7256 .or reshi.constant@navy.mil.



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SSCPAC 1.2 Competency Recognition Team photo

SPAWAR Pacific recognizes achievements made by individuals and teams in the Financial Manager Community annually.

A number of SPAWAR teams competed in the December ceremony to bring in the most toys for Toys for Tots. The event was a huge success with great contributions made by all. One group really outdid themselves and contributed far beyond anyone's wildest imagination. Below is a picture of a single team / work group who collected over 200 toys for the Toys for Tots drive!



BZ Team!

Come Join Us at Fisher House in 2018!

ASMC and DAUAA will be joining forces to prepare delicious meals for the residents of Fisher House in 2018. Here's how it works: A team of volunteers will spend 3-4 hours at the Fisher House kitchen preparing a meal. We need volunteers to plan the menu; do the shopping the day before the cooking event; meet at Fisher House to chop, slice, cook, bake, and have fun. We do this every month so there are plenty of opportunities to help. We have a great time and the Fisher House residents appreciate the home-cooked meals. It's a great way to help military heroes and their families. If you are interested in this rewarding volunteer opportunity, please contact Joanne MacDonald-Morrow at joanne.macdonald-morrow@dau.mil.



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February Lunch and Learn - Sponsored Charity: Fisher House

The Fisher House Foundation is very generous and new Fisher Houses come fully furnished, but there are things the Foundation does not provide or which we need on an ongoing basis. In addition, while the Navy funds day-to-day operational costs, including utilities and salaries, each Fisher House is responsible for the on-going provision of comfort items, non-perishable foods, etc. through voluntary donations. Based on this, some of the items we are in need of include:

Paper Products – Toilet Tissue, Paper Towels, Napkins, Plates, Bowls, Cups

Kitchen Staples- Creamer (Plain/Flavored), Splenda, Equal, Sugar, Cooking Oil, Spices, Mac & Cheese Cups, Dry Goods (Cereal, Granola Bars, Nuts, Cake Mixes, Cookie Mixes, etc.), Snacks, Bottled Water, Soda and Juice.

**** Everyone who makes a donation at the luncheon will be given a ticket for the gift giveaway!!! Please let's show our support to Fisher House.****





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NEWS FROM NATIONAL:

Maintain your DoD FM & CDFM with Becker!

Defense financial management professionals know how important it is to keep up with a constantly changing business world. ASMC is joining Becker Professional Education to bring you a new way of accessing the educational resources you need to help advance your career. Becker's Continuing Professional Education (CPE) courses can provide the professional development you need and earn the CET credits required to maintain DoD FM Certification Program (DFMCP), CDFM, CPA, CGFM, CMA, CIA and other professional certifications. **And for a limited time, Becker is offering ASMC members a 20% discount for On Demand Subscription Courses!**

Sign up here: <http://www.becker.com/cpe/why-becker/the-becker-difference/pricing>

Please use Promo Code "**ASMCCPE100**" to get the 20% off on Becker's Annual On-Demand Subscription.

A 12-month subscription to Becker's distance learning catalog provides unlimited use of more than 200 On Demand courses

Topics include:

- ✓ Financial Management
- ✓ Finance and Economics
- ✓ Government Auditing Practices and Procedures
- ✓ Government Accounting: Introduction and Intermediate
- ✓ Risk Assessment
- ✓ Yellow Book Financial and Performance Audits
- ✓ Ethics and Independence
- ✓ Engagement and Project Management
- ✓ Fraud, Waste and Abuse
- ✓ Improper Payments
- ✓ Misappropriation of Funds
- ✓ Forensics
- ✓ Taxation
- ✓ And more...

"RENEW" YEAR's Resolution program

Renew your annual membership in your expiration month, or beforehand, and we will enter you into a drawing for one of two \$50 gift cards. Renew on time or early for three years and you will be entered into a drawing for a \$150 gift card. Though we are launching this program during the holidays, we are going to make this renewal program a year-round recognition for our members who are renewing their memberships on time!

Accepting Achievement Award Nominations!

Award nomination forms must be submitted by January 31, 2018.



Retirement Article - Survivor Benefits While Employed

Happy New Year! I hope this monthly installment finds each of you well and healthy as we ring in 2018. As a Federal Retirement Specialist and Financial Advisor, I often field questions in regard to pension amounts and social security benefits, which is valid and expected. However, there is another side to the equation, your beneficiaries. Those who are left behind in the event of death are entitled to significant benefits as your spouse or named beneficiary. Understanding those benefits is very important, and a good amount of planning and consideration should be taken when making any changes to them. This article will focus on the FERS survivor benefits upon death while employed, although CSRS is very similar. As always, your situation may be unique so be sure to speak to a retirement advisor that is well versed in the benefits offered specifically to Federal employees.

Survivor Benefits

CSRS and FERS have survivor benefits available to their spouse, family and/or listed beneficiaries. The following explains benefits for two different periods of time; while employed and in retirement. This month, we will focus on the immediate benefits paid upon death while employed. Next month, we will go over the benefits available to spouses and beneficiaries if death occurs in retirement.

Benefits upon death while employed:

These benefits are payable in the event of an employee's untimely death, and certain criteria must be met in order to qualify for these benefits. Once met, the benefits are automatic and increase as an employee's length of service increases. The requirements are as follows:

- 1.) Employee had 18 months or more of civilian service.
- 2.) Spouse was married to the employee 9 months, or is a parent of the child of employee. (Neither of these two conditions apply in the event of accidental death.)
- 3.) The former spouse was married to the employee for at least 9 months and has a court order providing for payment of survivor benefits.
- 4.) The child is unmarried and:
 - a. Under age 18 : or
 - b. A full time student under the age of 22; or
 - c. Any age, but disabled as defined per Social Security guidelines before age 18.





Retirement Article - Survivor Benefits While Employed (continued)

Once these requirements are met, the benefits are as such:

- 1.) 2017 Basic Employee Death Benefit - \$32,423.56
- 2.) 50% of the deceased employee's final salary or High-3 average salary, whichever is greater. If the employee had at least 10 years of service, the spouse will receive 50% of the basic annuity that the employee would have received, based on High-3 and years of service at death, without any reduction for age. If the employee had less than 10 years of service, the surviving spouse would receive a refund of all retirement contributions paid by employee. A Special Retirement Supplement (SRS) will also be paid if the spouse is younger than 60 and not yet eligible for Social Security benefits.
- 3.) Custodial rights to any Thrift Savings Balance.
- 4.) 100% of any Federal Employees Group Life Insurance (FEGLI) that deceased employee was covered by at time of death.

Example

That is a lot of numbers and stipulations, so here is an example to put all the jargon into context. For our example, let us assume the following:

A FERS employee who is age 52, survived by a spouse age 51 and one child, age 13. This employee has 21 years and 8 months of creditable service, and a current salary of \$74,526. Upon death before retirement, his/her surviving spouse and child would receive:

Lump Sum:

- 1.) \$32,423.56 2017 Basic Death Benefit (taxable)
 - 2.) \$37,263 50% of annual salary (taxable)
 - 3.) \$378,600 Thrift Savings Balance (deferrable)
 - 4.) \$462,000 FEGLI (tax free!)
- \$910,286.56 Total lump sum benefits

Monthly:

- 1.) \$1345.00 per month to surviving spouse for life (50% of gross earned annuity).
 - 2.) \$1191.00* per month from Social Security until child is 18.
- \$2563.00 Total monthly benefits

*This is an estimate from Social Security for the purposes of this hypothetical example.



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Retirement Article - Survivor Benefits While Employed (continued)

I hope this sheds a little bit of light on the “other half” of the retirement equation, and stay tuned for next month, when we’ll highlight the survivor benefits available once the employee is in retirement. Have a safe and prosperous 2018!

Joe McGee is the Regional Vice President of Federal Employees First Alliance, a Chartered Federal Employee Benefits Consultant (ChFEBC), member of the National Ethics Association (NEA) and frequent speaker to Federal employee groups and agencies nationwide. With over 15 years of experience in the Federal retirement sector, his straightforward approach has provided clarity and confidence for those looking to retire with a full understanding of their benefits and how to maximize them. Individual and group consultations at his San Diego office in Mission Valley are offered at no cost, and he can be contacted at (619) 886-5129 or jmcgee@fefalliance.org



ASK MAC!



Dear Mac,

We have a contract that will expire soon. With the ongoing FY18 Continuing Resolution Authority we won’t have the funding in place to obligate the funds on the contract. The contractor will have to stop work within three weeks if funds are not made available. Can the program manager or contracting officer authorize a contractor to work at risk prior to the funds being obligation on the contract? We don’t want the contractor to stop work as it will impact the program and we know we’ll eventually get funding.

Lin D. Dunn

Dear Lin,

The program manager or contracting officer does not have the authority to authorize a contractor to work at risk. The creation of an obligation in advance of an appropriation would be a violation of the Anti-Deficiency Act. In this case a violation will occur when the obligation is created, directing the contractor to perform work without having the funds in hand. It doesn’t matter whether the direction is verbal or written and it doesn’t matter that the program will be impacted if the work stops. Actions are limited by FAR 1.602-1(B), which states, “No contract shall be entered into unless the contracting officer ensures that all requirements of law, executive orders, regulations, and all other applicable procedures, including clearances and approvals, have been met.” Government personnel that direct or encourage a contractor to continue work in the absence of funds are acting outside the scope of their authority and can be held personally liable for their actions and may be subject to civil or criminal penalties. In the event of a Continuing Resolution, the Contracting Officer can exercise an option year without funding if an Availability of Funds clause (FAR 52.232-19) is included in the contract. This informs the contractor of the government’s intent and willingness to exercise the option and the contractor can perform if and when funds become available. However, the clause doesn’t give the authority to direct or encourage the contractor to perform work without the necessary funds being available.

Thanks for a great question!

Sincerely,
Mac



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Congratulations New CDFM:

Ryan Green

If you are working on your exams,
keep up the good work!

ASMC ONLINE MEMBERSHIP LINKS:

Join ASMC:

<http://www.asmcnline.org/membership/join-renew/>

Update your Profile:

<http://www.asmcnline.org/membership/edit-profile/>

Renew ASMC Membership:

<http://www.asmcnline.org/membership/renew/>

The CDFM Program:

<http://www.asmcnline.org/certification/cdfm-information/>

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Justin Tuyay



Retirements – Submit upcoming retirements to Kathy Dockler at Kathy.dockler@navy.mil for recognition in the newsletter!