



Letter from the ASMC Executive Vice President:

GOALS

I can't believe it's 2019!! Surely by now you've set your resolutions and established some intentions for this great year ahead...it's the perfect time to go over some tips for successful goal setting!!

Here are some quick and effective tips on setting and realizing your most important goals:

1. Establishing goals

To determine what goals to set, ask yourself "what's important" to you? Identify your top goals, short term or long term/big or small.

2. Start with significant life categories.

Begin with a general, yet important category:

- a. Family
- b. Career
- c. Health
- d. Wealth/Finance
- e. Education

3. Write your goals down

Once you identify your goal, write it down!! When you write down your goals you solidify them. Then, take it a step further by keeping them where you can see them. Write them on your calendar, your planner...wherever you will notice them each day.

4. Break each goal into steps

Smaller steps tend to make goals more actionable. Keep it simple by narrowing it down to 3 main goals to prevent overextending yourself, identify the first step for each goal and then schedule it.

5. Establish deadlines

Note goal deadlines on your calendar and as you tackle each step, track your progress. Gain additional support by sharing your goals with your friends and family so they can share in your journey (and hold you accountable)!

Make sure to routinely review your goals and action steps to ensure they remain at the forefront of your priorities...make any necessary adjustments as you go along and don't forget to celebrate success!!

I highly recommend this great article written by Bradley Foster of the Huffington Post titled, "10 Steps to Successful Goal Setting" at <https://m.huffpost.com/us/entry/3226083>.



Happy New Year!!

Dawn M. Cano Medina, M.A., CDFM

ASMC San Diego Chapter Executive Vice President
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Check it Out!

Lunch & Learn

February - TBD

FM Training

Critical Thinking

ASMC National News

Website Update

Community Outreach

Fisher House

ASMC National News

Viva!novation Award

Ask Mac

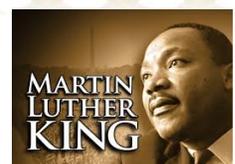
RDT&E

Fed Advisors

Tax Schemes

Contact Info

2004-2018 FIVE STAR CHAPTER





Board Meeting, Lunch & Learn

February Lunch and Learn

- Date:** TBD
- Location:** TBD
- Speaker:** TBD
- Subject:** TBD
- Charity:** TBD



March Board Meeting

- Date:** **March xx, 2019 12:00 - 1:00**
- Location:** SSCPAC Bldg A33, Rm 2036 - Contact a board member to RSVP, directions
- Dial-In Number:** (712) 770-4010
- Access Code:** 232877



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.

If you are interested in attending the below listed class I have 15 open seats available.

Below provides information on the competency levels each training covers for DOD FM Certification, as well as CET's awarded.

- Course Hours:** 24 CET/CPE'S awarded for attending
 - Course # Days:** 3
 - MGTC Course Code:** 4060
 - FM MyLearn Code:** L1288
 - Course Name:** Critical Thinking for Problem Solving
- This course applies toward the Department of Defense (DoD) Financial Management (FM) Certification Program.
- Competency:** Lead People
 - Proficiency Level:** Leveraging Diversity
 - Date:** February 25-27 2019

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. RM Conference Room located on the 5th floor. **There is no parking available onsite as the Broadway complex is under re-development.**



ASMC

San Diego Chapter
Volume 12
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ASMC National News

ASMC National Website Has a New Look!

Have you logged on lately?

[About](#) [FAQs](#) [Contact us](#)



American Society of Military Comptrollers

To promote education, training and professional development in all aspects of military comptrollership.

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ASMC American Society of Military Comptrollers

[Learn More](#)

See anyone you know?
Help us to make this new website YOUR website!
We've updated our look, so let's also update this site with the faces of the people who make ASMC what it is today!

Now Trending in Engage

RE: Past editions of Armed Forces Comptroller
By: *Sean Cook Cook, CDFM*, 5 days ago

Latest News

ASMC Newsletter: December 2018
December 20th, 2018 | 0 Comments

December 2018 Member Highlight
December 19th, 2018 | 0 Comments

Events

« JAN 2019 »

M	T	W	T	F	S	S
31	1	2	3	4	5	6





Fisher House

Here's an exciting volunteer opportunity! ASMC and DAUAA will be joining forces to prepare delicious meals for the residents of Fisher House in 2019.

Fisher House located at Naval Medical Center San Diego provides a "home away from home" for active and retired military families of patients who have been admitted for medical care. The Fisher House is available to families who are coping with the medical crisis of a loved one and have no local accommodations. The Fisher House Foundation generously provides a grant to pay lodging fees for all families to stay at the Fisher Houses. This is where we come in – ASMC will prepare a meal for the residents so when they return "home" after an exhausting day of taking care of their wounded or sick family member, they have a hot meal waiting for them.

If you would like to volunteer, please contact Joanne MacDonald-Morrow @ joanne.macdonald-morrow@dau.mil



ASMC San Diego chapter volunteered at the Fisher House over the Holidays

ASMC San Diego Chapter has had a long history of doing community outreach with various organizations. Due to the generosity of our members we've had successful fundraisers at our luncheons for multiple non-profit organizations. We highlight charities at each luncheon to familiarize our members with the wonderful work being done by each group in the San Diego area, while holding fundraisers that provide material goods and cash donations. Additionally, we volunteer many hours each year in support of various organizations. We highlight opportunities in the newsletter that ASMC members and their family members can volunteer.



ASMC Members,

One of ASMC's major priorities is to contribute to the effectiveness of defense financial management (FM) by providing education and professional development opportunities. Considering DoD and US Coast Guard priorities on innovation toward enhancing the effectiveness of operations, we are happy to announce an exciting new opportunity available to military and federal civilian members of the defense FM community.

Coinciding with PDI 2019, ASMC will shortly launch a competitive, awards-based competition called "Viva!nnovation." Through this initiative we will be encouraging the submission of new and innovative ideas toward continuing to enhance the quality and effectiveness of defense financial management operations. Unlike submissions of our Elsie Steffany Memorial Scholarship Award applications, which go through our chapters for evaluation and submission of one nomination per chapter to ASMC National HQ, all Viva!nnovation submissions will go directly to ASMC National HQ (via our National Awards platform) and not through ASMC chapters.

The defense FM community has a wealth of knowledge and experience, and ASMC is encouraging its brightest minds and talents to take the time to develop and submit new and innovative ideas based upon the information and guidelines provided below regarding Viva!nnovation. The following award opportunities will be available*:

\$1,000 1st place
\$750 2nd place
\$500 3rd place
\$250 4th place

Requirements:

- Eligibility to submit Innovative Ideas is open to all members (military and civilian) of the DoD and USCG financial management communities; it is not limited to only ASMC members who are military and civilian members of DoD or USCG. ASMC appreciates that our corporate members remain engaged in recommending and supporting innovative defense FM initiatives; however, this award competition will fall under the ASMC individual and team category, available only to FM employees of the DoD and USCG.
- Individuals or teams of no more than three individuals may submit an Innovative Idea package. Individuals are limited to the submission of only one idea, regardless of whether they submit as an individual or as part of a team.
- Submission packages must include a one-page description of the innovative idea, detailing its benefits, estimated cost, recommended steps for implementation, and proposed timeline of implementation, presuming a "project champion" is promptly identified.
- The Innovative Idea must be something new. It cannot be a project that has already been formally proposed or considered or already underway within the Department of Defense or the US Coast Guard.



- Submission packages must include a bio of no more than 150 words and contact information (including phone, email, and mailing address) for each individual listed on the submission package. Bio information (name, organization, etc.) will not be included in the polling info.

Presentations/Process:

- The top 4 individuals or teams as ranked via ASMC's "Engage" Collaboration Platform by ASMC Member votes will receive free registration to PDI 2019 in San Antonio. Each ASMC member will be allotted only one vote.
- The presentations will be conducted live at PDI in front of a representative senior panel of award committee members. Viva!Innovation presentations will be "pitched" to the panel in front of the PDI 2019 audience during a General Session – Thursday, 30 May or Friday, 31 May of 2019 (TBD).
- If submitting as a team, all members of the submission team must be present during the live panel presentation. Individuals must be self-represented; no proxy will be permitted.
- Each presentation will be limited to five minutes and may include audio/visual components, including but not limited to: PowerPoint presentations and video clips.
- Creativity and value are key, so lively and engaging presentations will best reflect the purpose of the Viva!Innovation competition.

Timeline:

- Military and civilian members of the DoD and USCG financial management communities will be asked to submit their Viva!Innovation idea package online via the ASMC Awards platform not later than 1 February 2019. Submissions will be accepted starting not earlier than 10 December 2018.
- A committee will review submission packages for completeness. Any submission package not complete by the 1 February 2019 deadline will not be uploaded to ASMC's "Engage" Collaboration Platform for voting.
- All complete submissions will be uploaded into ASMC's "Engage" Collaboration Platform NLT 18 February 2019.
- Voting in the poll will begin on 20 February and end on 6 March 2019. All ASMC members will be encouraged to vote for the best idea from a viewpoint of creativity, cost/benefit, and perceived contribution to the effectiveness of defense financial management.
- Individuals or team members who submitted the four highest ranked submission packages will present their Viva!Innovation ideas in front of a live audience at PDI 2019 in San Antonio.

Al Runnels, CDFM-A
Executive Director
ASMC



ASK MAC!



Mac,

We have FY18 RDT&E that carried over into FY19. We planned to use it for travel in the first and second quarters of FY19. The Comptroller informed us that it can't be used for that purpose. The analyst didn't provide a reference to regulations or statute. Is he correct?

Lynn D. Dunn

Dear Lynn,

Legally, RDT&E funds can be used to fund any bona fide need requirement that occurs in the first or second year of the appropriation so travel occurring in FY19 can legally be funded with either FY18 or FY19 RDT&E.

The fiscal law that applies here is the Bona Fide Need Rule (Title 31, U.S. Code, Sec 1502) which states: (a) The balance of an appropriation or fund limited for obligation to a definite period is available only for payment of expenses properly incurred during the period of availability or to complete contracts properly made within that period of availability and obligated consistent with Section 1501 of this title. However, the appropriation or fund is not available for expenditure for a period beyond the period otherwise authorized by law.

There is also a Comptroller General of the United States ruling that supports this position. It states "The bona fide needs rule provides that a fiscal year appropriation may be obligated only to meet a legitimate need arising in the fiscal year for which the appropriation was made (58 Comp. Gen. 471, 473 (1979)). The bona fide rule applies with equal force to multiple year appropriations. (55 Comp. Gen. 768, 773 (1976)). The appropriation involved here was available for a two-year period and any bona fide need arising within that two-year period could be charged to the appropriation. There is no requirement that two year funds be used only for the needs of the first year of their availability." (68 Comp.Gen. 170 (1989)).

A third reference is the GAO Redbook, Chapter 5, which is an excellent reference on the Bona Fide Need Rule and can be found at the following URL: <https://www.gao.gov/legal/appropriations-law-decisions/red-book>.

Even given the legal basis, local policy may dictate otherwise. So although legally you can use FY18 RDT&E to fund FY19 travel, your local comptroller might have a more restrictive policy.

Thanks for a great question.

Sincerely,
Mac



Beware of Schemes During Tax Season

It's tax season! Every year, around this time, the Internal Revenue Service (IRS) publishes its dirty dozen – a list of scams criminals use to try and ferret out personal information and/or steal money.¹ For example, if you received an email from a top executive in your company or organization requesting data from IRS form W2 for the 2018 tax year, what would you do?²

The right answer is: Don't respond.

Disguising an email to look like it's from your boss or someone higher up in your firm is called **spoofing**. Criminals have been spoofing corporate employees for years, and now they're turning their attention to school districts, tribal organizations, restaurants, hospitals, and nonprofits, according to a February 2017 IRS press release.³ If you receive a suspicious email, contact your Human Resources department.

Spoofing is just one scheme among many. Here are some of the other scams you should guard against:

Phishing. Merriam-Webster explains phishing like this, "...A common phishing scam involves sending emails that appear to come from banks requesting recipients to verify their accounts by typing personal details, such as credit card information, into a Web site that has been disguised to look like the real thing. Such scams can be thought of as 'fishing' for naïve recipients."⁴

If you receive an email purporting to be from the IRS, remember this: The IRS does not contact taxpayers about refunds or tax bills using email, text, or social media. In fact, the agency cautions Americans not to click on a link in an email claiming to be from the IRS.¹

In addition, banks and financial institutions typically won't ask for confidential personal information (user names, passwords, personal identification numbers, and so on) through text message, email, or social media. One bank provided examples of fake emails that had been sent to its customers, including this one:⁵

Dear account holder,

Due to concerns for the safety and integrity of your online account, we have issued this warning message. It has come to our attention that your account information needs to be updated due to inactive members, frauds, and spoof reports.

We ask you to visit the following link to start the procedure of confirmation on customer data.

To get started, please click [HERE](#).

Please don't reply directly to this automatically-generated email message.

Instead of clicking on a link in a suspicious email or text, call your local bank branch or IRS office to ask whether they sent the request.



Beware of Schemes During Tax Season, continued

Phone scams. Be wary if you receive a call and the person says they are from the IRS – even if caller ID says it’s the IRS and the person on the other end of the line offers a badge number and official sounding title – because it’s likely a scammer.⁶

Criminals have been impersonating IRS agents and demanding immediate payment of taxes without giving the taxpayer an opportunity to question or appeal the amount owed. They may threaten the taxpayer with arrest, deportation, or another punishment. The IRS does not do this. Scammers may also require a specific payment method, such as a prepaid debit card, or insist taxpayers provide credit or debit card numbers over the phone. Don’t do it.⁶

Instead of engaging, take the caller’s information, refrain from giving out any of your information, and tell them you will call back. Then, look up the number for your local IRS office. Call them to confirm if the caller is an actual IRS employee or not. Don’t call the number provided by the caller.⁶

Identity theft. Criminals have been using other people’s personal information (Social Security numbers, names, addresses, birth dates, etc.) to obtain money or credit for many years. Recently, scammers have also been filing false tax returns. The IRS has implemented measures that appear to be effective.¹ At the end of 2016, USA Today reported, “An unprecedented public-private crackdown has helped cut taxpayer identity theft reports in half and prevented millions of dollars in fraudulent refunds.”⁷

Regardless of the progress that has been made, the IRS cautioned, “Taxpayers need to watch out for identity theft especially around tax time. The IRS continues to aggressively pursue the criminals that file fraudulent returns using someone else’s Social Security number. Though the agency is making progress on this front, taxpayers still need to be extremely cautious and do everything they can to avoid being victimized.”¹

If you discover someone has filed a tax return using your personal data, Intuit.com advises you complete IRS Form 14039 and mail it to the IRS.⁸

Being wary can help protect against scammers, but criminals may find a way to capture your personal information regardless of any precautions you take. If you worry your data may have been comprised, the Federal Trade Commission suggests considering a credit freeze, which lets you restrict access to your credit report and makes it more difficult for identity thieves to open new accounts in your name. You’ll still be able to open new accounts or allow credit checks by prospective employers or landlords, but you’ll need to specifically unfreeze your account for that purpose. To learn more, contact one of the credit bureaus: Experian, Equifax, or TransUnion.⁹



Beware of Schemes During Tax Season, continued

Sources:

- 1 <https://www.irs.gov/uac/newsroom/irs-summarizes-dirty-dozen-list-of-tax-scams-for-2017>
- 2 <https://www.edsurge.com/news/2017-02-07-phishing-season-widespread-email-scam-targets-schools-edtechcompanies>
- 3 <https://www.irs.gov/uac/dangerous-w-2-phishing-scam-evolving-targeting-schools-restaurants-hospitals-tribalgrouops-and-others>
- 4 <https://www.merriam-webster.com/dictionary/phishing>
- 5 <https://www.chase.com/digital/resources/privacy-security/security/suspicious-emails>
- 6 <https://www.irs.gov/uac/newsroom/phone-scams-continue-to-be-a-serious-threat-remain-on-irs-dirty-dozen-list-of-tax-scams-for-the-2016-filing-season>
- 7 <http://www.usatoday.com/story/money/2016/11/03/irs-says-2016-crackdown-helped-slow-identity-theft-taxrefund-fraud/93234624/>
- 8 <https://turbotax.intuit.com/tax-tools/tax-tips/General-Tax-Tips/Identity-Theft--What-to-Do-if-Someone-Has-Already-Filed-Taxes-Using-Your-Social-Security-Number/INF23035.html>
- 9 <https://www.consumer.ftc.gov/articles/0497-credit-freeze-faqs>

Securities offered through “Your B/D Name Here”, Member FINRA/SIPC.

The above material was prepared by Peak Advisor Alliance. Peak Advisor Alliance is not affiliated with the named broker/dealer.

About Gerald Jones (President of Fed Advisors):

Gerald Jones (Chartered Federal Employee Benefits Consultant) has been serving in the financial arena for 8 years, with a concentration in the federal space for 3 years. He took notice of the intense need that government employees had for education and assistance when it came to their benefits, retirement and financial goals...

About Fed Advisors:

At Fed Advisors, we through the overwhelming benefits according to your employees need assistance the complexity and limited Advisors comes in.



specialize in educating you process of maximizing your needs. Typically, federal in reviewing their benefits, due to resources. That is where Fed

Our benefits specialists are here to help walk you along the way. When you sit down with one of our counselors, you will receive a review of your federal benefits package, as well as see a prognosis of what you can conservatively expect of your TSP (or similar vehicle), pension and Social Security at retirement. We will guide you through the correct way to fill out your retirement paperwork if needed, updating your beneficiary forms and if applicable, military buyback information. You will walk away with knowledge, confidence and most of all ... A CLEAR PLAN.



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New CDFM:

Katie Johnson

Congratulations!



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/>

New! Engage Platform:

<https://engage.asmcnline.org/>



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