



**MSBO School Finance Services Committee
Up North Workshop
Treetops - Gaylord, MI**

Thursday, October 17, 2024

- 6:00 pm **Reception** – Oak Room, The Lodge
Sponsored by American Fidelity; Kingscott Associates, Inc.; National Insurance Services; Plante Moran; and Stifel, Nicolaus & Company, Inc.
- 7:00 pm **Dinner** – Oak Room, The Lodge
- 8:30 pm **Hospitality** – Birch Room, The Lodge
Sponsored by Corebridge Financial Services

Friday, October 18, 2024 Agenda

- Officers: **Mark Mesbergen**, Chairperson, Fruitport Community Schools
Lori Mayo, Vice Chair, Michigan Center Schools
Anna Wamack, Secretary, Midland Public Schools
Officer-Elect – **open**
Michael Klosowski, Past-Chairperson, Elkton-Pigeon-Bay Port Laker Schools
- 7:30 am **Breakfast Buffet** – Oak Room, The Lodge
Sponsored by MILAF+/PFM Asset Management, LLC
- 8:30 am **Welcome and Call to Order** – *Mark Mesbergen, Chairperson*
Officer-Elect Nominations
Approve FY2024-25 Slate of Officers
- 8:40 am **MSBO Update** – *Robert K. Dwan and Jason Helsen, MSBO*
- 8:50 am **Legislative Update** – *David Ladd, Kelley Cawthorne*
- 9:20 am **The Power of Succession Planning** – *Todd Surline, Hiring Solutions LLC*
- 10:00 am **Break**
- 10:15 am **MDE Accounting Update*** – *Christopher May, Michigan Department of Education*
- 10:45 am **Accounting & Auditing Update*** – *Eric V. Formberg, Plante Moran (retired partner)*
- 11:30 am **Labor Relations & Legal Update** – *Katherine Wolf Broaddus, Thrun Law Firm, P.C.*
- 12:15 pm **Roundtable, Wrap-Up, and Review** – *Mark Mesbergen, Chairperson*
FY2024-25 MSBO School Finance Committee Calendar & Topics
- 12:30 pm **Adjourn**

Next Meeting: Friday, November 15, 2024, 9:30 AM - Zoom

Complete the credit form and evaluation on the event webpage
3.75 SCECH 1.5 CPE Accounting & Auditing* and 3 CPE Other