



CMTA Executive Board
C/o Ms. Kelley Williams, CMTA Secretary
Via E-mail: kwilliams@ci.arcadia.ca.us

Re: Quarterly Activities Report – Division 5 (03/31/08)

Members of the Executive Board:

Division Activities

None to report, at this time. Regrettably, Division 5 was unable to hold a Chapter Meeting this past calendar quarter.

Division Finances

Beginning Bank Balance (01/01/08):	\$4,283.50
2007 List Serve Charge (CMTA)	(125.00)
Event Revenues	-0-
Event Expenses	-0-
Ending Bank Balance (12/31/07):	<u>\$4,158.50</u>

Plans for Next Quarter

We are planning a Joint Meeting with the East Bay Chapter of CSMFO for May 2008. The meeting will feature two topics: “Fraud Issues in Local Government” (featuring Ms. Michelle Nelson a Certified Fraud Examiner (Mann, Urrutia & Nelson, CPA’s) and a “Sales Tax Outlook” (featuring Mr. Jerry Peeler, MuniFinancial Services, Inc.). Both of these individuals are well respected in their respective fields and known for their work in public agencies in Northern California and Nevada. Ms. Nelson’s program will be similar to the “Fraud It Can Happen to You” Presentation given by Joe Aguilar (Vavrinek, Trine, Day & Company) at the 2007 Annual Conference in Long Beach. Mr. Peeler’s talk will include: a regional analysis of Sales Tax performance and trends, sales tax projections for major economic categories, a discussion of some strategies for economic development and business retention and an overview on Voter-Approved Transaction and Use Taxes.

Where: Hs. Lordships Restaurant (Berkeley, California)
Date: 05/15/08
Program: As described above (1.5 hours)

Respectfully Submitted,

A handwritten signature in black ink, appearing to read "Richard Loomis". The signature is fluid and cursive, with a prominent initial "R" and a long, sweeping tail.

Richard Loomis
Division 5, Chairperson

Cc Marc Puckett (mpuckett@ci.costa-mesa.ca.us)