

IGFOA DOWNSTATE CHAPTER CONFERENCE

February 10 - 11, 2025 | Speaker Bios

Aaron Allen, Division Manager, Local Tax Allocation, Illinois Department of Revenue

Aaron received a B.S. in Agribusiness, Farm, and Financial Management from the University of Illinois at Urbana-Champaign and a M.B.A. from the University of Illinois at Springfield. He has worked for the Department of Revenue for 17 years in the Motor Fuel Division, Audit Division, as the Section Manager of the Alcohol and Tobacco Processing Section, and now as the Division Manager of the Local Tax Allocation Division since April 2018.

Denise Cappis, Director, Grant Services, CliftonLarsonAllen LLP

Denise is a director in Grant Services and has more than 20 years of accounting experience, which includes providing outsourced grant services to organizations as well as supporting day to day accounting and finance functions. She has experience assisting entities in researching funding opportunities, preparing grant applications, grant reporting, grants management, financial analysis, and other reporting requirements. In addition to doing grant research, writing and management, Denise's experience also includes audit preparation, giving presentations, reviewing and analyzing financial documents, budgeting and forecasting, and financial reporting and analysis. Denise is a member of the Illinois CPA Society and a graduate from Illinois State University.

Brad Cole, Executive Director, Illinois Municipal League (IML)

Brad serves as executive director of the Illinois Municipal League, which is the statewide association of 1,298 cities, villages, and towns. The League's mission is to articulate, defend, maintain, and promote the interests and concerns of Illinois communities. Previously, Brad was Senior Vice President of Pepsi MidAmerica, a privately-owned soft drink bottling and distribution business servicing a five-state franchise territory. His duties involved supervision of all aspects of the company, including finance, administration, human resources, fleet management, equipment services, and sales. Prior to entering the private sector, he worked as Downstate Director for U.S. Senator Mark Kirk, of Illinois. In that position, he was a key member of the senator's senior management team and was responsible for strategies initiative, outreach and constituent services in 95 (of 102) counties of Illinois. Cole served as Mayor of the City of Carbondale, Illinois for two four-year terms, which followed one four-year term on the City Council.

Before entering local government service, Brad was Deputy Chief of Staff to Illinois Governor George H. Ryan. He directly advised the Governor and coordinated the administration of government services relative to the southern 40 counties of Illinois. Active as a leader for numerous public and private organizations, he has served on a library board, a park district board, a school board, a regional healthcare system board, a multi-state economic development commission, and in many other similar posts. He has been appointed to commissions by four of the past five Governments of Illinois and was nominated to national board appointment by President George W. Bush. He is Chairman Emeritus of Sister Cities International (a citizen diplomacy organization based in Washington, DC), having served two years as chairman of its global board of directors. Brad Cole is a graduate of Southern Illinois University at Carbondale with a bachelor's degree in a double major of Political Science and Biological Science, and a Master of Legal Studies degree from the SIU School of Law. He originally hails from Macon Illinois.

Jennifer Flores, Principal, Lauterbach & Amen, LLP

Ms. Flores has been a part of the Lauterbach & Amen team since 2019. She assists numerous downstate Pension Funds through her role as a Pension Services Administrator and with her expertise in Local Records Management.

Ms. Flores has developed a unique records management program offered by Lauterbach and Amen, LLP and has dedicated countless hours putting the Illinois Local Records Management processes into practice for Police and Fire Pension Boards, Fire Protection Districts, Municipalities and other local government agencies across the state.

By streamlining the Records Identification and Disposal (Records ID) service, she has been able to assist her clients with the management, retention and disposal of their local records in a lawful manner which adheres to the Illinois Local Records Act.

Tim M. Lynch, Vice President, Senior Commercial Card Sales Consultant, Regions Bank

Timothy M. Lynch currently serves as Vice President, Senior Commercial Card Sales Consultant for Regions Bank and is based in Mid-America. In this capacity, Tim manages the commercial card product for new sales working with the

relationship teams in Arkansas, Missouri, Tennessee, Indiana, Illinois, and Kentucky in the Regions Bank footprint, identifying opportunities to provide card and payables solutions to clients and prospects. Tim has more than 18 years of experience in the commercial card industry – within the public and private sectors.

Prior to joining Regions Bank, Tim was with Citi as a Vice President in the Public Sector Management Group where he managed the Commercial Card Program for the U.S. Department of the Navy - Washington, D.C. During this time, he managed the Navy and Marine Corps global card program – consisting of more than 250,000 accounts, exceeding \$3B in annual spending.

In addition to his experience managing a public-sector card program for the Department of the Navy, Tim spent 2 years at American Express, as a Manager of Account Development. Before entering the private sector, he served on active-duty in the U.S. Marine Corps from May 1992 until retiring as a Master Sergeant in May 2012. While in the Marine Corps, Tim served in the Financial Management field completing his career by serving as the Component Program Manager for the Marine Corps Travel Card Program, Oct 2006 – May 2012.

Adam Pulley, CPA, Principal, State and Local Government, CliftonLarsonAllen LLP

With more than 17 years of experience, Adam specializes in audits of state and local governmental entities. He has also served the engagements of various governmental entities conducted under the Single Audit and OMB standards. Adam has supervised financial audit engagements and single audits, provided technical assistance to personnel during engagements, and has assisted governmental entities in preparing financial statements to obtain the GFOA Certificate of Excellence. Adam is a member of the Illinois CPA Society and is a graduate from the University of Illinois, Urbana-Champaign.

Loren Sanders, Founder and Principle, Roxlo Coaching and Consulting

Loren Sanders is a renowned author and visionary leader with over two decades of experience revolutionizing Healthcare, Human Resources, and Personal Development. Known as a “Professional Synergist,” her expertise encompasses organizational effectiveness, learning and development, talent acquisition, employee benefits, and leadership development. Her acclaimed book, *Empathy is Not a Weakness*, has garnered numerous accolades.

Loren's mission is to eradicate toxic leadership and behavior from workplaces. She pioneers initiatives that build inclusivity, belonging, and psychological safety. Her innovative approaches to talent development and service delivery consistently enhance corporate culture and improve organizational outcomes.

A sought-after speaker, Loren regularly shares her insights at national conferences. She combines empathy with performance, aligning individual talents and passions with organizational goals. As the owner of Roxlo Coaching and Consulting, she guides clients to transformative change through actionable plans.

Loren holds a degree in Community Health Education from the University of Illinois at Urbana-Champaign and an MBA in Organizational Behavior from the Lake Forest Graduate School of Management. She also contributes to academia as an adjunct instructor at her alma mater.

Jim Snyder, Senior Principal, Miller, Canfield, Paddock & Stone, P.L.C.

James Snyder is a member of Miller Canfield’s Public Finance Group, where he provides counsel to a broad range of governmental entities across Illinois. He acts as bond counsel and disclosure counsel to hundreds of entities, including school districts, cities, villages, counties, park districts, and special districts, and serves as underwriter’s counsel for numerous municipal bond underwriters.

Jim’s extensive experience covers a wide array of municipal finance transactions, such as general obligation bonds, revenue bonds, special service area bonds, tax increment bonds, industrial development revenue bonds, multifamily housing bonds, and Section 501(c)(3) revenue bonds.

Jim’s accolades include being named to The Best Lawyers® in America for Public Finance Law from 2009 to 2024 and receiving the Chicago “Lawyer of the Year” award for Public Finance Law in 2016. He is also recognized in Chambers USA America’s Leading Lawyers for Public Finance, achieving the highest ranking (Band 1) in 2023 and 2024.

Jeffrey A. Taylor, Senior Vice President, Corporate Banking Group, Fraud Forensics, Regions Bank

Jeff Taylor joined Regions in 2014 and serves in a leadership role within the Regions Corporate Bank. Taylor guides strategies designed to help protect the security of Commercial and Corporate Banking accounts. He is consistently on the forefront of research and awareness in terms of fraud prevention, and he meets with clients across the bank's multi-state footprint to help educate them on best practices regarding account security. In addition, Taylor is frequently cited by news outlets that turn to him for practical, relatable advice on how businesses and individual consumers can help protect their accounts and avoid falling victim to scams. A 28-year banking veteran, Taylor previously held positions in Treasury Management with other financial institutions. Prior experience includes sales and management roles in other industry segments before bringing his experience to the financial services industry.

He earned his degree in Business Administration from Freed-Hardeman University and his Certified Treasury Professional designation from the Association for Financial Professionals. Taylor has served in leadership roles for the Alabama Association for Financial Professionals and has been a presenter at the AFP National Conference as well as other industry roundtables. He also leads and participates in national fraud consortiums focusing on the financial services industry. Taylor currently serves on the Board of Directors for The Bell Center, a nonprofit dedicated to maximizing the potential of children from birth to three years of age who are at risk for developmental delay.

Hope Wheeler, CPA, Principal, State and Local Government, CliftonLarsonAllen LLP

Hope has more than 30 years of experience providing auditing services to governmental organizations. Hope has served as a reviewer on the external peer review and CLA internal inspection teams. She is a member of the AICPA, Illinois CPA Society, GFOA, and IGFOA. In addition to her professional affiliations, Hope has served on the board of directors for Champaign West Rotary and the Executive Club of Champaign County and is past president of the board of directors of Don Moyer Boys and Girls Club and is currently the treasurer/secretary of their foundation board. Hope is the 2021 Athena Award winner for Champaign County.

Kevin Wills, Investment Banking Specialist, Bernardi Securities, Inc.

Kevin Wills joined Bernardi Securities in December 2018 and brings over 21 years of experience in the financial services industry, including more than 17 years of expertise in Illinois public finance. He is responsible for structuring both taxable and tax-exempt bond issues across tax-capped and non-tax-capped counties. Over the years, Kevin has served as lead banker on hundreds of Illinois bond issues, working with public school districts, community colleges, cities and villages, airport authorities, park districts, forest preserve districts, counties, public building commissions, and water/sewer districts. His in-depth knowledge of the various bond types issued by Illinois governmental entities enables him to effectively address the financing needs of his clients. Kevin holds a B.A. in Finance and Economics from Illinois State University and is licensed in Series 7 and Series 66.