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**Association of Public Pension Fund Auditors  
("APPFA")  
Professional Development Conference**

**18.4 CPE Hours**

**October 20 to 23, 2025**

**Folsom, California**

**Lake Natoma Inn**

**702 Gold Lake Dr, Folsom, CA 95630**

## Fall 2025 Conference Agenda

Date	Event	Location
<b>Monday, October 20<sup>th</sup>, 2025</b>		
6:00 PM – 8:00 PM	<b>*Welcome Reception</b>	Sutter Room
<b>Tuesday, October 21<sup>st</sup>, 2025</b>		
7:00 AM – 8:15 AM	<b>*Breakfast and Networking</b>	Sutter Room
8:15 AM – 8:30 AM	<b>*1a. Opening Remarks</b> Nicki Russell, CPA, CIA, MPA, Chief Auditor, MOSERS (APPFA President)	Sierra Ballroom
8:30 AM – 9:30 AM	<b>1b. Welcome to California and Women in Leadership</b> Julie Underwood, CPA, Chief Financial Officer, CalSTRS Michele Nix, CPA, Chief Financial Officer, CalPERS	
9:30 AM – 10:25 AM	<b>^1c. Implementing the New Global Internal Audit Standards for Impact</b> Mike Peppers, CIA, QIAL, CRMA, CPA, Chief Audit Executive, The University of Texas System	
10:25 AM – 10:35 AM	<b>* Networking Break (10-minutes)</b>	
10:35 AM – 11:25 AM	<b>1d. Implementing the New Global Internal Audit Standards for Impact cont.</b> Mike Peppers, CIA, QIAL, CRMA, CPA, Chief Audit Executive, The University of Texas System	
11:25 AM – 12:25 PM	<b>*Lunch and Networking (1-hour)</b>	Sutter Room
12:25 PM – 1:45 PM	<b>1e. Board Reporting and Communications Cybersecurity</b> Reema Parappilly, CISA, CIA CDPSE, Partner, Weaver & Tidwell, L.L.P. Trip Hillman, CISSP, GPEN, QSA, GSNA, CISA, GCWN, GCFE, CEH, Partner, Weaver & Tidwell, L.L.P.	Sierra Ballroom
1:45 PM – 2:40 PM	<b>^1f. Pension Fund Investment Basics and Investment Risks</b> Bruce Mills, CIA, CFE, Partner, Asset Management Consulting, Governance Risk and Compliance Services, Weaver and Tidwell, L.L.P. Kelly Ragsdale, Director, Asset Management Consulting, Governance, Risk and Compliance Services, Weaver and Tidwell, L.L.P.	
2:40 PM – 2:55 PM	<b>* Networking Break (15-minutes)</b>	
2:55 PM – 4:35 PM	<b>1g. Roll Call of the States</b> Alex McDowell, CIA, CISA, CRISC, Internal Audit Assistant Manager, sSURS (APPFA Vice-President)	
6:00 PM – 8:00 PM	<b>*Group Dinner</b> (see page 14)	Gaslight Co.



APPFA Professional Development Conference, Fall 2025, Folsom, California

# Fall 2025 Conference Agenda

Date	Event	Location
<b>Wednesday, October 22<sup>nd</sup>, 2025</b>		
7:00 AM – 8:30 AM	<b>*Breakfast and Networking</b>	Sutter Room
8:30 AM – 8:40 AM	<b>*2a. APPFA Housekeeping</b> APPFA Bylaws and Policy Committee, Jennifer Schreck, CPA, CISA, PMP, Internal Audit Director, VRS ( <i>APPFA Bylaws &amp; Policy Committee,</i> <i>Chairwoman</i> )	Sierra Ballroom
8:40 AM – 9:30 AM	<b>2b. Using Data Analytics in IA Risk Assessment</b> Brittany Smith, CPA, CIA, Manager, CliftonLarsonAllen, L.L.P. Randy Romes, CISSP, CRISC, CISA, MCP, PCI-QS, Principal, CliftonLarsonAllen, L.L.P.	
9:30 AM – 10:25 AM	<b>^2c. Generative AI in Internal Audit</b> Justin Zavis, Senior Manager, Risk Consulting. Ernst & Young, L.L.P.	
10:25 AM – 10:35 AM	<b>* Networking Break (10-minutes)</b>	
10:35 AM – 11:25 AM	<b>2d. Stronger Together: Leveraging IA to Elevate Financial Statement Assurance</b> Jen Aras, CPA - Partner, Crowe, L.L.P Hamzeh Qattan, CPA - Senior Manager, Crowe, L.L.P.	
11:25 AM – 12:30 PM	<b>*Lunch and Networking (1-hour)</b>	Sutter Room
12:30 PM – 1:20 PM	<b>2e. Pension System Administration Post Go-Live</b> Jen Aras, CPA - Partner, Crowe, L.L.P Rich Perilloux, CISA -Partner, Crowe, L.L.P.	Sierra Ballroom
1:20 PM – 2:15 PM	<b>^2f. AI Governance: A Primer for Practitioners of Internal Audit</b> Jamey Loupe, Principal and Governance, Risk and Compliance practice leader, Sikich, L.L.P Steve Randall - Principal, Sikich, L.L.P.	
2:15 PM – 2:30 PM	<b>*Networking Break with Snacks and Refreshments (15-minutes)</b>	
2:30 PM – 3:20 PM	<b>2g. Beyond the Numbers: Unmasking Fraud in Public Pension Systems</b> Hilary Cabodi, Managing Director, Riveron	
3:20 PM – 4:45 PM	<b>^2h. TBD</b> Katie Valdivia, Organizational Development Manager, CalSTRS	
4:45 PM – 6:00 PM	<b>APPFA Business Meeting (including officer elections)</b>  Dinner is on your own, enjoy some time exploring Folsom!	



APPFA Professional Development Conference, Fall 2025, Folsom, California

## Fall 2025 Conference Agenda

Date	Event	Location
<b>Thursday, October 23<sup>rd</sup>, 2025</b>		
7:00 AM – 8:30 AM	<b>*Breakfast and Networking</b>	Sutter Room
<b><u>8:30 AM – 8:40 AM</u></b>	<b>*3a. APPFA Housekeeping &amp; Membership Committee Update</b> APPFA Membership Committee	Sierra Ballroom
8:40 AM – 10:20 AM	<b>3b. Ethics for Internal Auditors</b> Jim Kreiser, Principal; State & Local Government, National Leader for Risk and IT Services, CliftonLarsonAllen, L.L.P.	Sierra Ballroom
10:20 AM – 10:35 AM	<b>* Networking Break (15-minutes)</b>	
10:35 AM – 11:25 AM	<b>3c. Employer Audits Successful Practices from the Pension System Frontlines</b> Panel Discussion by the APPFA Best Practices Committee Amanda Jenami, Chief Audit Executive, TRS Cindie Lor, Assistant Division Chief, CalPERS Chris Wall, Assistant Director Employer Audits, CalSTRS	
11:25 AM – 11:35 AM	<b>*Conference Closing</b>	
<p><b>*Items marked with an * do not qualify for CPE.</b>  <b>^Times have been adjusted to allow for speaker transitions.</b></p>		

APPFA will provide a link via email for the Conference APP (Eventsential) to registered attendees closer to the conference date. The APP will include session descriptions, learning objectives, speaker information, session surveys, overall conference survey, and other relevant information.



More information about the Conference APP  
is on page 13 of this brochure.



*APPFA Professional Development Conference, Fall 2025, Folsom, California*

## **\*\*Event and Session Information\*\***

**The Conference APP includes the speaker information.**

**Monday, October 20<sup>th</sup>, 2025**

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### **Welcome Reception, 6:00 – 8:00 PM**

You can catch up and network with pension members and colleagues at the welcome reception in the Sutter Room of the conference hotel.

*\*This event does not qualify for CPE.*

**Tuesday, October 21<sup>st</sup>, 2025**

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### **1a. Opening Remarks, 8:15 – 8:30 AM**

**Nicki Russell, CIA, CPA, MPA, Chief Auditor, MOSERS (APPFA President)**

The APPFA President will officially start the conference. Attendees will be reminded of conference or event information, announcements, encouraged to sign into each session to get CPE (via the Conference APP), and to complete the session surveys. Additional information about the Conference APP will be shared with attendees. One highlight of the Conference APP is the “Top Contributor Board”. This is an interactive experience through the APP to help attendees get the most out of the conference. This is a way to share your thoughts and experiences during the conference.

*\*This session does not qualify for CPE.*

### **1b. Welcome to California/Women in Leadership, 8:30 – 9:30 AM**

**Julie Underwood, CPA, Chief Financial Officer, CalSTRS**

**Michele Nix, CPA, Chief Financial Officer, CalPERS**

This session will provide attendees with a warm welcome to Cali. Julie Underwood and Michele Nix will present highlights from the CalSTRS/CalPERS pension funds and discuss women in leadership. Attendees will take away industry knowledge and learn more about two of the largest pension funds in the US.

*Specialized Knowledge*

### **1c/1d. Implementing the New Global Internal Audit Standards for Impact, 9:35 – 11:25 AM**

**Mike Peppers, CIA, QIAL, CRMA, CPA, Chief Audit Executive, The University of Texas System**

Four years ago, the IIA International Internal Audit Standards Board (IIASB) launched one of its largest projects ever – the review and update of the International Professional Practices Framework (IPPF) and Standards. The IIASB released the new Global Internal Audit Standards effective January 2025. Our speaker for this session was the chairman of the IIASB during this historic period and will share information and perspectives on the IPPF project and comments on the new Standards. Most importantly, he will challenge us to implement and conform with the Standards to have lasting, positive impacts on the organizations we serve. *Auditing (Governmental)*



*APPFA Professional Development Conference, Fall 2025, Folsom, California*

**1e. Board Reporting and Communications Cybersecurity, 12:25 – 1:45 PM**

**Reema Parappilly, CISA, CIA CDPSE, Partner, Weaver & Tidwell, L.L.P.**

**Trip Hillman, CISSP, GPEN, QSA, GSNA, CISA, GCWN, GCFE, CEH, Partner, Weaver & Tidwell, L.L.P.**

Effectively communicating information to the board is instrumental to communicating risks and the results of the internal audit function. Sharing critical data can become challenging when board members have various experience and understanding. Our presentation will offer insight into the reports your board finds most valuable and include information on reporting on IT/cybersecurity risks and IT/cybersecurity projects.

*Information Technology*

**1f. Pension Fund Investment Basis and Investment Risks, 1:50 – 2:40 PM**

**Bruce Mills, CIA, CFE, Partner, Asset Management Consulting, Governance Risk and Compliance Services, Weaver and Tidwell, L.L.P.**

**Kelly Ragsdale, Director, Asset Management Consulting, Governance, Risk and Compliance Services, Weaver and Tidwell, L.L.P.**

This session provides a foundational overview of investment principles tailored for internal auditors in pension fund environments. It will cover the characteristics and roles of both public and private asset classes and walk through the full investment lifecycle—from strategic planning and asset selection to monitoring, valuation, and exit. Attendees will gain a clearer understanding of how investment decisions are made and managed, enhancing their ability to assess controls, compliance, and risk across the portfolio. *Auditing (Governmental)*

**1g. Roll Call of the States, 2:55 – 4:35 PM**

**Alex Deal, CIA, CISA, CRISC, Internal Audit Assistant Manager, SURS (APPFA Vice-President and APPFA Program Committee, Chair)**

**Individuals who are attending the conference and are non-members  
or do not have internal audit responsibilities  
should not attend the “Roll Call of the States” session.**

Before the conference, each attending system completed a Roll Call of the States survey. A representative from each participating organization (i.e., System) will share highlights from their respective system. In addition, all the staff from that System will participate through introductions. This is a way for other attendees to know which System you represent and helps with networking and follow-up if attendees have questions about any of the content shared. Attendees will take away information about audit topics and prompt networking by identifying peers working on similar projects or facing similar challenges. There will be no roundtable discussions with this session.

*Auditing (Governmental)*

**Group Dinner, 6:00 – 8:00 PM**

This is an off-site networking event and dinner. Gaslight Co. is a short walk from the hotel. Attendees will meet in the lobby at approximately 5:50 PM and walk together to the destination.

*\*This event does not qualify for CPE.*





**2a. APPFA Housekeeping, 8:30 – 8:40 AM**

**APPFA Bylaws & Policy Committee, Jennifer Schreck, CPA, CISA, PMP, Internal Audit Director, VRS (APPFA Bylaws & Policy Committee, Chairwoman)**

Attendees will receive an update on any potential APPFA Bylaws and Policies changes. They will be reminded of conference or event information, announcements, encouragement to sign into each session to get CPE, to complete the session surveys, and to complete the conference survey.

*\*This session does not qualify for CPE.*

**2b. Using Data Analytics in IA Risk Assessment, 8:40 - 9:30 AM**

**Brittany Smith, CPA, CIA, Manager, CliftonLarsonAllen, L.L.P.**

**Randy Romes, CISSP, CRISC, CISA, MCP, PCI-QS, Principal, CliftonLarsonAllen, L.L.P.**

This session will focus on how data analytics can be effectively integrated into the internal audit processes specific to pension funds. Participants will learn about the latest data analytics tools and techniques tailored to the pension fund industry, explore relevant case studies, and gain practical insights into implementing data-driven risk assessment strategies. By the end of the session, attendees will be equipped with the knowledge and skills to enhance their internal audit functions, ensuring the security and efficiency of pension fund operations. *Information Technology*

**2c. Generative AI in Internal Audit, 9:35 – 10:25 AM**

**Justin Zavis, Senior Manager, Risk Consulting. Ernst & Young, L.L.P.**

The internal audit function is increasingly vital in navigating the complexities of AI governance and risk management. Internal Audit is crucial in supporting your organization as the third line of defense, particularly in managing AI risks and overseeing AI governance. This session will dive into the AI regulatory landscape on the guidelines on design, use, and deployment of AI, and your roles when performing internal audit engagements. We will present a roadmap for auditing AI and developing a strategy that aligns with your organization's maturity. We will also discuss key AI risk and control considerations as part of your internal audit plan and engagements and the tools to mitigate potential threats effectively. *Auditing (Governmental)*

**2d. Stronger Together: Leveraging IA to Elevate Financial Statement Assurance, 10:35 – 11:25 AM**

**Jen Aras, CPA - Partner, Crowe, L.L.P.**

**Hamzeh Qattan, CPA - Senior Manager, Crowe, L.L.P.**

In the world of public pension funds, trust, transparency, and accountability are non-negotiable. This session explores potential synergy between internal audit and external (independent) financial statement audits. Participants will gain insight into how internal audit functions can be a powerful resource for external auditors, reducing redundancy, increasing audit efficiency, and enhancing the quality of internal controls over financial reporting. We'll delve into best practices for coordination, how to align risk assessments, and real-world examples of successful collaboration. *Auditing (Governmental)*



**2e. Beyond the Launch: Navigating the Post-Go Live Frontier of Pension System Implementations, 12:30 – 1:20 PM**

**Jen Aras, CPA - Partner, Crowe, L.L.P.**

**Rich Perilloux, CISA -Partner, Crowe, L.L.P.**

Going live is just the beginning. As pension systems modernize their IT infrastructure, the real challenges—and opportunities—emerge after implementation. This session dives into the critical post-go-live phase, where the focus shifts from deployment to performance, governance, data integrity, security, and system optimization. Attendees will explore evaluating system readiness, mitigating emerging risks, and strengthening ongoing operational controls. They will also hear lessons learned, audit considerations, and how auditors can add value through continuous oversight and collaboration with IT and operations teams.  
*Auditing (Governmental)*

**2f. AI Governance: A Primer for Practitioners of Internal Auditors, 1:25 – 2:15 PM**

**Jamey Loupe, Principal and Governance, Risk and Compliance practice leader, Sikich, L.L.P**

**Steve Randall - Principal, Sikich, L.L.P.**

During this presentation, we will explore critical aspects of AI Governance relevant to the practice of Internal Audit. As AI technologies become increasingly integrated into organizational processes, organizations need to implement and integrate the frameworks and principles that ensure ethical, transparent, and accountable use of Artificial Intelligence and the data that feeds AI models. Good AI governance ensures AI solutions reliably address the organization's objectives while also meeting regulatory requirements that are increasingly coming from local, state, and federal regulatory agencies. *Information Technology*

**2g. Beyond the Numbers: Unmasking Fraud in Public Pension Systems, 2:30 – 3:20 PM**

**Hilary Cabodi, Managing Director, Riveron**

"Beyond the Numbers: Unmasking Fraud in Public Pension Systems" is an insightful presentation for Chief Audit Executives and internal audit leaders. It emphasizes the critical need to look beyond traditional financial audits to uncover hidden fraud risks that threaten the integrity of public pension funds. The session equips professionals with practical tools and real-world insights by exploring behavioral red flags, non-financial data analytics, procurement vulnerabilities, and ethical culture. Attendees will gain a deeper understanding of how to detect, investigate, and prevent fraud that strengthens oversight and safeguards public trust. *Auditing (Governmental)*

**2h. TBD, 3:20 – 4:45 PM**

**Katie Valdivia, Organizational Development Manager, CalSTRS**

**APPFA Business Meeting, 4:45 – 6:00 PM**

Per [APPFA's Bylaws](#), several things are required at the fall business meeting, including the election of officers and the approval of APPFA's annual budget. In addition, the Committee Chairs will summarize the items they have worked on and that could have a future impact on APPFA. As to voting, the designated Primary representative, or their designee, of each Regular member organization is entitled to cast one vote at the business meeting. The officer positions up for election include secretary, treasurer, webmaster, and two board member positions. A nomination call for officer candidates will occur in August 2025.

*\*This event does not qualify for CPE.*

**Dinner is on your own!**



*APPFA Professional Development Conference, Fall 2025, Folsom, California*



**Thursday, October 23<sup>rd</sup>, 2025**

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**3a. APPFA Housekeeping and Membership Committee Updates, 8:30 – 8:40 AM**

**APPFA Membership Committee**

We will hear updates and/or reminders from the Membership Committee. Attendees will be reminded of conference or event information, announcements, and encouragement to sign into each session to get CPE, complete the session surveys, and complete the conference survey.

*\*This session does not qualify for CPE.*

**3b. Ethics for Internal Auditors, 8:40 – 10:20 AM**

**Jim Kreiser, Principal; State & Local Government, National Leader for Risk and IT Services, CliftonLarsonAllen, L.L.P.**

Ethics is an increasing challenge and “moving target” at times. How do ethics play a role in what we do, and how do we do it as internal auditors? This session will discuss recent events and situations, examine and review organizational areas that impact ethics, and how internal audit and leaders can enhance awareness and mindset. We will also identify unique ethical areas for internal auditors and assess requirements of objectivity and independence in the role of internal audit(ors). Lastly, the session will address incrementalism and overconfidence bias as key concepts for consideration within your organization and the impacts on ethics, culture, and expectations. *Behavioral Ethics*

**3c. Employer Audits: Successful Practices from the Pension System Frontlines, 10:35 – 11:25 AM**

**Panel Discussion by the Best Practices Committee, Facilitated by Amanda Jenami, CPA, CISA, CIA, CIDA, CHIAP, CFE, Chief Audit Executive, TRS (APPFA Best Practices Committee, Chairwoman and APPFA Board Member)**

**Cindie Lor, Assistant Division Chief, CalPERS**

**Chris Wall, Assistant Director Employer Audits, CalSTRS**

In an era of increasing regulatory scrutiny and evolving compliance landscapes, employer audits play a critical role in safeguarding the integrity of pension systems. This panel brings together experienced auditors from leading pension systems to share proven strategies, practical insights, and lessons learned from the field. Attendees will gain a behind-the-scenes look at how pension auditors approach employer audits—from planning and risk assessment to execution and follow-up. Panelists will discuss best practices for fostering collaboration with employers, leveraging data analytics, navigating complex reporting requirements, and ensuring audit findings lead to meaningful improvements. Whether new to pension auditing or looking to refine your current practices, this session offers valuable takeaways to enhance audit effectiveness, promote compliance, and protect member benefits. *Auditing (Governmental)*

**3d. Conference Closing, 11:25 – 11:35 AM**

**Alex Deal, CIA, CISA, CRISC, Internal Audit Assistant Manager, SURS (APPFA Vice-President and APPFA Program Committee, Chair)**

The conference will conclude with any questions about the conference, CPE, or other APPFA topics. A final reminder will be announced to complete the conference session surveys and the overall conference survey.



*APPFA Professional Development Conference, Fall 2025, Folsom, California*

## Fall 2025 Conference Registration Information

**Conference Registration will be open until September 30<sup>th</sup>, 2025.** The board-approved conference registration fee is \$600 per person, and it must be received by September 30<sup>th</sup>, 2025 to reserve your place at the conference. The conference registration fee helps pay for the conference materials, access to the conference APP, conference room, food during the conference, group meal, refreshments, and audio and visual services. We strive to provide a low-cost conference with a high-quality line of speakers. All this is for 18.4 hours of CPE and the opportunity to expand your knowledge and network with peers.

### **\*\* IMPORTANT INFORMATION ABOUT CONFERENCE REGISTRATION ~ PLEASE READ \*\***

Registration for this conference will be made via our website. **The “conference registration” should be completed by the primary representative of your organization.** NOTE: After the “conference registration” is complete, **all individuals registered for the conference will receive an email** with a mandatory registration link, which will allow for their individual conference choice, called the *“event and meal registration.”* The *“events and meal registration”* allows each attendee to inform conference planners of their attendance at events and provide any dietary restrictions so that APPFA can give this information to the catering services. After completing each registration, an invoice will be generated with instructions for payment (if applicable).

**Primary Representatives:** Please use the [conference registration link](#) to register the staff from your organization who will attend the conference.

Link: [https://appfa.memberclicks.net/fall2025\\_folsomca](https://appfa.memberclicks.net/fall2025_folsomca)

### **Location and Hotel Information**

We are excited to welcome you all to this year’s APPFA conference in beautiful Folsom, California. This year’s conference will be held at Lake Natoma Inn, a charming hotel in the heart of historic Folsom, California. Located just northeast of Sacramento, the town of Folsom boomed during the famous Gold Rush of the 19th century. The historic Sutter Street area provides a glimpse into this rich history, a charming street lined with historic buildings, shops, and restaurants.

Immortalized by the famous 1968 concert by Johnny Cash, the Folsom State Prison has also

become a well-known city symbol. In addition, Folsom is known for its natural beauty, offering a popular spot for outdoor activities such as hiking, biking, water sports, and cycling.



**The conference room rate is \$132** plus applicable taxes. Reservations may be made by calling the hotel directly at 916-351-1500 and referencing “Group Number 8908084” for the room block or using the hotel reservations link below. The conference rate is available from October 19<sup>th</sup> with checkout on



*APPFA Professional Development Conference, Fall 2025, Folsom, California*

October 25<sup>th</sup>, 2025 (please note Friday, October 24<sup>th</sup> has an increased rate. These rates are subject to availability. **Please make your registration by Monday, September 30<sup>th</sup>, 2025 to receive the group rate.** After this date or when the group block is full, the reservations will be subject to the prevailing rates and availability.

**Hotel Reservations Link:** <https://bookings.travelclick.com/13381?groupID=4516779#/guestsandrooms>

Note: APPFA has committed to a specific number of guest rooms. We **strongly encourage** you to book your guest room through the APPFA's block of group rooms. Once the room block is filled, the conference room rate may not be available. The [hotel website](#) includes information on the hotel amenities, room features, and nearby attractions.

## Transportation

Sacramento International Airport is the primary airport that provides air transportation. The hotel is approximately 35.2 miles from the airport. Attendees must provide their transportation from the airport to the hotel. There is complimentary self-parking on site.

## About Your Sponsors and Continuing Professional Education

The APPFA Professional Development Conference is a group-live conference designed to further enhance participants' auditing skills and provide a forum for the exchange of ideas and concepts. Attendees should have a basic knowledge of accounting and auditing procedures, practices, and theory. There is no experience requirement, and no advance preparation is needed. APPFA members who are currently working in internal audit, compliance, and/or risk management are the individuals who should attend. See Table 1 for more information.

Attendees will receive an attendance certificate via email following the completion of this conference. We anticipate issuing the conference certificate via email approximately one month after the conference ends. Auditing and accounting professionals may qualify for Continuing Professional Education (CPE) credits by attending this conference, which is designed to comply with the American Institute of Certified Public Accountants' Statement on CPE Standards. The number of CPE is based on each attendee using the Conference APP (see next section) and electronically checking into each conference session. If your CPE certification is incorrect, attendees should contact Kurt Petrie, APPFA secretary, at [kurt.petrie@etf.wi.gov](mailto:kurt.petrie@etf.wi.gov).

APPFA is registered with the National Association of State Boards of Accountancy (NASBA), as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors through their website: [www.nasbaregistry.org](http://www.nasbaregistry.org).

Your attendance will enable you to expand your internal audit knowledge and apply what you learn to your current role. Upon completion of the conference, participants will be able to:

- Recognize how pension leaders have overcome challenges.



*APPFA Professional Development Conference, Fall 2025, Folsom, California*

- Identify what other pension systems are experiencing, determine contrasts and similarities, and apply that information to future audit planning.
- Understand the impact of new and emerging technologies on audit practice and system implementations.
- Understand emerging issues in the internal audit field.
- Take information from peers in networking sessions to gain a greater understanding of leading practices and take your career to the next level.

Table 1: CPE-related summary information for this conference, as it relates to all sessions, is listed below.



**Table 1: CPE Summary Information**

<b>Criteria</b>	<b>Description</b>
<b>Delivery:</b>	Group Live – All sessions include a question-and-answer session.
<b>CPE Credits:</b>	18.4
<b>Education or Experience Prerequisites (Who Should Attend):</b>	None. Public pension fund auditors at all levels are encouraged to attend.
<b>Level of Knowledge:</b>	Overview – Basic.
<b>Advance Prerequisites:</b>	None.
<b>NASBA Fields of Study:</b>	Auditing (Governmental), Behavioral Ethics, Information Technology, and Specialized Knowledge.

## Conference APP

The Conference APP was referenced earlier in this brochure. This section will explain just a bit more. The Rdmobile/Eventsential APP will be used during the conference. This app can be found in the Apple App Store, Google Play Store, and on your Windows laptop through a link supplied prior to the conference.

The email used for your APPFA registration will be the email that is used to link your account to the Rdmobile/Eventsential account. All users must have and be logged into their Rdmobile/Eventsential account during the conference to perform check-ins while accessing the APPFA event materials. When signing up or logging in, the Rdmobile/Eventsential account might ask you to verify your identity from the APPFA registration email account. **If you will not have access to that email address at the conference, be sure you sign into your Rdmobile/Eventsential APP prior to leaving for the conference to ensure you will have access!**

**Being logged in to the Rdmobile/Eventsential account allows your data and check-ins to be tracked and reported to APPFA for CPE credits.** This information is required by AICPA to verify your attendance and disbursed CPEs. **If you are not logged in, your check-ins and attendance will not be reported.**

A paper sign-in sheet will also be available at the conference should an attendee experience technical difficulty during the conference. If a technical difficulty occurs, then the attendee should notify Matt Priestas, APPFA webmaster, at [webmaster@appfa.org](mailto:webmaster@appfa.org).

## Complaint and/or Refund Policy

Information on how to submit a complaint or request a conference refund is included on the [APPFA website](#). Refunds are available if a written cancellation notice is received 20 days before the conference. Refunds will not be issued after that date.

## Other Information

### Monday Evening Welcome Reception

We will gather on Tuesday evening from 6:00 to 8:00 PM at the Sutter Room for the welcome reception. Please attend the reception to network with your colleagues. Light appetizers and refreshments will be provided. We encourage attendees to wear a shirt or jacket that represents their system. This helps with networking and identifying where another attendee works.



### Tuesday Evening Group Dinner

Our group dinner will take place at [Gaslight Co](#), a craft bar and kitchen located a short walk from the hotel. Part speakeasy, part craft bar, it is sure to be a great venue for our group.



### **Optional: Wine Tasting!**

It wouldn't do justice to have a conference in California and not have the chance to sample some of their fantastic wine. On Wednesday, October 22<sup>nd</sup> there will be an optional wine tasting event held at [Willamette Wineworks](#), a seven-minute walk from the hotel. There will be two tastings at different hours, both will feature Oregon and California wines. The prices for the wine tasting are as follows:

- \$40 for wine tasting only at 6 PM
- \$58 for wine tasting with chocolate pairing at 7:30 PM

Each attendee will be responsible for paying for their wine tasting at the time of the event. For more details or to reserve your spot, please contact Brian Carlson at [bcarlson@calstrs.com](mailto:bcarlson@calstrs.com).

### **Optional: APPFA Game Night**

For all of our gamers out there, come test your gaming skills at the first-ever APPFA Super Smash Bros Ultimate tournament. Entry is free, and all skill levels are invited to attend. The bracket begins at 6:30 PM on Wednesday, October 22<sup>nd</sup>. If you are interested, please email Alex Bonser at [alexander.bonser@CalPERS.ca.gov](mailto:alexander.bonser@CalPERS.ca.gov) or talk to him at the conference.

### **Guests**

Those of you traveling with friends and family are welcome to bring your guests to any of the social activities planned during the conference at the rate noted below.

- Monday evening reception (no charge)
- Breakfasts on Tuesday, Wednesday, and Thursday (\$20 per meal)
- Group lunches on Tuesday and Wednesday (\$20 per meal)
- Group dinner on Tuesday (\$50 per guest)

### **Attire**

**Informal Smart Casual Look.** There is no official dress code for this conference, but we recommend clothing that makes you feel comfortable as you will be sitting the entire day of the conference. Layers are always a good suggestion because then you can dress up or dress down, as the room temperature can vary. At the welcome reception, we suggest (but not mandatory) that you wear clothing representing the system you work for (i.e., a CalSTRS, CalPERS shirt or jacket). This can help identify attendees to a particular pension system. On the last day of the conference, we generally see attendees dress more casually and comfortably, as this is generally a travel day for most.

### **Folsom Fun Facts**

1. Folsom was established during the California Gold Rush in 1849.
2. Folsom State Prison, opened in 1880, was the first prison in the US with electricity and gained international fame from Johnny Cash's live performance and album of the same name.
3. The Folsom Powerhouse, built in 1895, was one of the first in the nation to transmit high-voltage alternative current over long distances.
4. The city boasts over 50 miles of recreational trails for cyclists and pedestrians.
5. Folsom's Historic District features well-preserved buildings from the Gold Rush era, housing museums, shops, and restaurants.





### **Folsom Recommended Destinations:**

1. Folsom Premium Outlets (2.7 miles from hotel)
2. Folsom Zoo (1.2 miles from hotel)
3. Red Hawk Casino (18.7 miles from hotel)
4. Apple Hill (29.2 miles from hotel)
5. Several wine tasting spots near and around El Dorado Hills (8.2 miles from hotel)
6. Placer Wine Trail (Granite Bar 9.7 miles, Auburn 18.2 miles from hotel)

## **Conference Contacts**

### **System Hosts:**

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## **Helpful Reminders**

1. Both the conference registration and hotel registration end on September 30<sup>th</sup>, 2025. Please use the links provided to APPFA members to book your conference registration and hotel registration.
2. The primary representative must begin the conference registration process by registering all the attendees from their system.
3. Once the conference registration process is completed then APPFA will email the individual attendees so each person can let APPFA know what meals they plan to attend, if a guest will be coming, and other relevant information.
4. The conference APP will be available about one week before the conference.
5. Attendees use the conference APP to check into every session. CPE is only granted if you “check-in” and attend a conference session.
6. Each conference session has a survey. We want your feedback on every session!
7. The conference has an overall survey. We want your feedback about the overall conference!
8. The CPE certificate will be issued via email about 30 days after the conference.
9. Log into the APPFA website to make sure your system information, including the auditors listed for your system is accurate and up to date. We know turnover occurs, so please ensure your information on APPFA’s website is updated.



*APPFA Professional Development Conference, Fall 2025, Folsom, California*

10. If you haven't signed up for the community forum, then what are you waiting for? The community forum is an excellent way to network and share information electronically with the entire APPFA community between conferences. But you can only participate if you sign up. Information on how to sign up is in the "Procedures for Website Processes" under Quick Links on APPFA's website.

**What is Next? Glad you Asked! . . . . Columbus, Ohio!!**

The APPFA Program Committee, along with members from OPERS (Ohio Public Employees Retirement System, our conference hosts) is working on your Spring 2026 Conference. The Spring 2026 Professional Development Conference dates have been set with the conference occurring April 27<sup>th</sup> – 30<sup>th</sup>, 2026 in Columbus, Ohio. Stay tuned for more information via email or on [APPFA's website](#).

