

2nd Annual
University of Wisconsin-Madison
Financial Forum



April 27, 2015
12:30 p.m. - 4:30 p.m.
Varsity Hall, Union South

A continuation of the
campus-wide discussion
about internal controls and
leading financial
management practices
in higher education

*Contributing
to the
Wisconsin Idea
through Financial Responsibility*

2015 UW-Madison Financial Forum

Agenda

12:30 p.m. - 1:00 p.m.	Registration and Networking	
1:00 p.m. - 1:10 p.m.	Welcome	Martha Kerner, CPA, Assistant Vice Chancellor for Business Services
1:10 p.m. - 1:25 p.m.	Vice Chancellor Remarks	Darrell Bazzell, Vice Chancellor for Finance and Administration
1:25 p.m. - 2:10 p.m.	UW-Madison Financial Internal Controls Initiative Progress Update	Martha Kerner, CPA, Assistant Vice Chancellor for Business Services
2:10 p.m. - 2:30 p.m.	Capital Equipment Update and Administrative Process Redesign <ul style="list-style-type: none">◆ Capital Equipment Update◆ Capital Equipment Administrative Process Redesign	Dan Langer, CPA, Controller and Director of Accounting Services
2:30 p.m. - 2:45 p.m.	Break	
2:45 p.m. - 3:00 p.m.	Session Introduction	Jim Walker, Associate Dean and Chief Financial Officer, Wisconsin School of Business
3:00 p.m. - 4:00 p.m.	Financial Reporting Educational Session <ul style="list-style-type: none">◆ Role of Accounting and Financial Reporting in an Organization◆ Key Accounting and Financial Principles and Practices◆ Internal Controls over Financial Reporting	Terry Warfield, PwC Professor in Accounting and Chair of the Department of Accounting and Information Systems, Wisconsin School of Business
4:00 p.m. - 4:30 p.m.	Questions & Answers	

Note

This event qualifies certified public accountants for CPE credits (one credit per hour). If you would like a certificate of attendance, please complete the form in your folder and drop it off at the registration table when you leave.

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Speakers



Darrell Bazzell, Vice Chancellor for Finance and Administration, UW-Madison

Darrell Bazzell has been serving as the Vice Chancellor for Finance and Administration at the University of Wisconsin-Madison since January 2003. In this capacity, he serves as the University's Chief Financial Officer, and is responsible for the overall supervision of the University's administrative and auxiliary functions, including budget, facilities planning and management, business services, housing, research administration, human resources, police services, health services, student unions and recreational sports. He also serves as senior advisor to the Chancellor and Provost on financial and administrative policies and practices.



Martha Kerner, CPA, Assistant Vice Chancellor for Business Services, UW-Madison

Martha Kerner has been serving as Assistant Vice Chancellor for Business Services since April 2012. She leads the division that includes the departments of Accounting Services, Bursar, Internal Audit, Purchasing Services and Risk Management. Martha also has more than 25 years of professional experience in Wisconsin state government, holding numerous leadership positions in the areas of finance, accounting, budgeting, internal business and administrative operations.



Dan Langer, CPA, Controller and Director of Accounting Services, UW-Madison

Dan Langer has led UW-Madison Accounting Services function within Business Services since 2012 and served as the Wisconsin School of Business Associate Dean for Finance & Administration the two years prior. His career previous to UW included extensive industry and professional services experience in strategic governance and management, finance, accounting and internal audit, including professional experiences in more than 25 countries.



Jim Walker, Associate Dean and Chief Financial Officer, Wisconsin School of Business

Since joining the University in April 2013, Jim Walker has served as the Chief Financial Officer of the Wisconsin School of Business. He is responsible for the School's Financial Management Office, which delivers accounting, finance, and business services in support of the School's strategies and all of its units. Jim also chairs the Advisory Committee to the campus-wide Financial Internal Controls initiative. Jim is an alumnus of the Wisconsin School of Business and spent more than 30 years as a financial executive in the energy industry with Amoco and BP, leading financial operations units as well as major systems, organizational design, and internal control transformation efforts.



Terry D. Warfield, PwC Professor in Accounting and Chair of the Department of Accounting and Information Systems, Wisconsin School of Business

Professor Warfield's area of expertise is financial accounting. Prior to his academic career, he worked for five years in the banking industry, and from 1995-1996 he served as the Academic Accounting Fellow in the Office of the Chief Accountant at the U.S. Securities and Exchange Commission in Washington, D.C. While on the staff, he worked on projects related to financial instruments and financial institutions, and he helped coordinate a symposium on intangible asset financial reporting.

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The Vice Chancellor for Finance and Administration
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bussvc.wisc.edu/internalcontrols