

***The Massachusetts
Collectors and Treasurers
Association***

***Fifty Eighth Annual Conference
On Local Taxation and Finance***

June 10, 11, 12, 13, 2007

**Sea Crest Oceanfront Resort & Conference Center
Old Silver Beach, North Falmouth, Cape Cod**

P R O G R A M

Sunday, June 10, 2007

3:00 - 6:00 P.M.	Conference Registration	Hotel Lobby
3:00 - 6:00 P.M.	Exhibit Booth Set-Up	Nauset Center
6:00 - 9:00 P.M.	Cape Cod Buffet	Dining Room
9:30 P.M.	Entertainment	Surf Lounge

The MCTA depends on you, our members and associate members, to provide us with your feedback on our programming. The Education Committee wants to make next year's 59th Annual Conference even better, with educational programs and speakers who meet your needs. Please fill in your Conference Evaluation Form and return the completed form to be entered into a raffle! You might win a drawing prize, **sponsored by Moody's Investors Service.**

(Your Conference Badge is Your Ticket for Admission to All Conference Events – Please wear your Conference Badge at all times.)

If You Are Attending Any Session Marked With an *Asterisk For Credit Towards Re-Certification, You Must Sign a Sign-In Sheet For That Session

Please Turn Off All Cell Phones And Pagers Before Entering A Classroom

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Monday, June 11, 2007

- 9:00 Nauset I & II **Opening of the Conference** – **F. Ellen McKay**, MCTA President
Welcome to Falmouth - Chairman, Falmouth Board of Selectmen
- 9:15 Nauset I & II **MCTA Annual Meeting and Election of Officers** - **F. Ellen McKay**, MCTA President
- 9:45 Nauset I & II **MCTA's Governmental Affairs Agenda** - **Joanne Savignac**, MCTA 2nd VP
Update and Action Plan with **Stephen Roche**, MCTA Legislative Agent
- 10:15 Exhibit Area **Morning Refreshment Break** **Sponsored by Jeffery & Jeffery**
Visit with our Exhibitors during the break – this is an educational opportunity
- 11:15 Nauset I & II *Course #851 -- "**Understanding Municipal Financial Statements** "
Bring Your Own Statements and Review Section by Section
Moderator, **F. Ellen McKay**, CPA, Treas/Coll, Boylston, Collector, Shutesbury and MCTA President
James Powers, CPA, Powers & Sullivan
Second Presenter **T B D**
- 12:45- On the Pavilion **Luncheon Cook-Out** - **Co-Sponsored by T D Banknorth**
1:30 **Hamburgers, Hot Dogs and all the fixings** and by **Sovereign Bank**
- 2:00 Ballrooms 1 & 2 *Course #852 - "**Understanding Your Audit – An Open Forum**"
Moderator, **Nancy Holt**, Treasurer/Collector, Marshfield and MCTA 1st VP
James Powers, CPA, Powers & Sullivan
Kathleen Colleary, Chief, Bureau of Municipal Finance Law, MA DOR
F. Ellen McKay, CPA, Treasurer/Collector, Boylston and Collector, Shutesbury
- 3:30 The Surf Deck **An Ice Cream Social** – **Sponsored by Financial Investors Trust**
Make Your Own Sundaes and Count Each Other's Calorie Intake
- 4:00 Ballroom 1 *Course #853 – "**Detecting and Investigating Fraud**"
Moderator, **F. Ellen McKay**, Treasurer/Collector, Boylston, Collector, Shutesbury, and MCTA President
James Powers, CPA, Powers & Sullivan
Nancy Holt, Treasurer/Collector, Marshfield and MCTA 1st VP
- 4:30 **Exhibit Area Re-Opens** - Visit with our Exhibitors - this is an educational opportunity
- 5:30 In Exhibit Area - **Evening Reception** - **Hors d'Oeuvre** Co- Sponsored by **Patriot Properties**
and by **The Bank of Western Massachusetts**
Cabaret in Nauset II - Music by **The Charles River Stompers** - **Co-Sponsored by Peoples' Bank**
and by **Eastern Bank**
- 7:00 Oceanfront Dining Room - **Annual Dinner** – Your Choice of **Steak, Salmon or Lobster**
Hot Steamed Lobster is a Sea Crest Specialty
- 8:30 Ballroom 2 **Operate Your Own Race Car** **Sponsored by Bank of America**
Select Your Car, (1/12 scale) Take The Controls, and Show Us Your NASCAR Style
This will be an elimination tournament with prizes for the surviving drivers.

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Tuesday, June 12, 2007

- 7:30 Bayside **MCTA Executive Board Meeting** – Retiring, Continuing and Newly Elected Officers
- 9:00 Nauset I & II ***Course #834 "Inside New England - Is the Image Real?"**
Historical Vignettes About This Place We Call Home - from
Judson D. Hale, Sr., Editor-in-Chief of Yankee Magazine **Sponsored by Citizens Bank**
- 10:30- Exhibit Area **Morning Refreshment Break** - **Sponsored by Bartholomew and Co.**
- 11:30 Visit our Exhibitors during the break – this is an educational opportunity
- 11:30 **Office Productivity Workshops** **Sponsored by Century Bank and by Bristol County Savings Bank**
- Nauset I ***Course #843 "Dealing With Our Three C's – Customers, Conflicts and Crisis"**
Ann Egan, a professional trainer in the areas of management development, supervisory and teamwork training, performance management, customer service skills, time management, conflict resolution and diversity appreciation focuses on **the differences in our styles, and how we react to and cope with things a bit differently.**
- Nauset II ***Course #845 "Multi-Tasking and How to Prevent Multi Messes - Can It Be Done?"**
Kyle Hinkle, instructor in organization management, basic and advanced skills mediation and facilitation training for not-for-profit businesses and boards of directors, **offers tried and true methods for planning for productivity.**
- 12:45- Ocean Front Dining Room – **Lunch Buffet** **Sponsored by First Southwest Co.**
- 1:30 **A New York Delicatessen and Make Your Own Tacos** **and by UniBank**
- 2:00 Ballroom 1 **Collectors *Course #863 – "Working With Tax Services to Collect Delinquent Taxes"**
Moderator **John Duggan**, Treasurer/Collector, West Bridgewater, Tax Service/Tax Collector Committee Chairman,
Lisa Clark Tax Collector, Rockland
Brian Downey, Data Analyst, ZC Sterling Real Estate Tax Solutions
Frank Howard, Client Relations Consultant, Wells Fargo Real Estate Tax Services
Paul Fioretti, Agency Relations Specialist, Landamerica Tax and Flood
Bruce Johnson, FIS Tax Services, Agency Representative
Mike McFadden, Data Procurement Specialist, First American Real Estate Tax Service
- 2:00 Ballroom 2 **Treasurers *Course #865 – "School Building Construction - Post Moratorium"**
Katherine Craven, Executive Director of the Massachusetts School Building Authority will discuss procedures for school building projects and bring us an update on progress over the last several years.
- 3:30 On the Beach - **Afternoon Refreshments and** **Sponsored by Mellon Trust**
MCTA Annual Volleyball Tournament **of New England**
Photo Mouse Pad Opportunity **Sponsored by Kelley & Ryan**
- 4:00 At Poolside - **Collectors and Treasurers Issues Clinic–**
Discussion with **F. Ellen McKay**, Treasurer/Collector, Boylston, Collector, Shutesbury, and MCTA President
and **Nancy Holt**, Treasurer/Collector, Marshfield and MCTA 1st VP
- 4:30 **Exhibit Area Re-Opens** - Visit with our Exhibitors - this is an educational opportunity
- 5:30 In the Exhibit Area - **Evening Reception** - Hors d'Oeuvre **Sponsored by Countrywide Tax Services**
Cabaret in Nauset II - Piano Stylings of **Richard Giordano** **Sponsored by Cape Cod Five Cents Savings**
- 7:00 Oceanfront Dining Room - **MCTA Annual Banquet** – your choice of **Prime Rib or Swordfish**
Installation of our Incoming President and the New Slate of Officers
Recognition of our Past Presidents and Senior Members
- 8:30 Oceanfront Dining Room - **"Bucky Lewis – The King of North Country Humor"** **Sponsored by I N G**
With his Guitar, Songs and (Clean) Comedy Routines, Bucky Will have You Rolling in The Aisles

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Wednesday, June 13, 2007

- 9:00 – 10:30 Ballroom 2 ***Course #201 - Review of New Legislation**
Gary Blau, Esq., Attorney, Property Tax Bureau, Massachusetts Department of Revenue
An explanation and discussion of new laws affecting the duties and responsibilities of Treasurers and Collectors.
Attendance at this presentation may be substituted for attendance at Course #201 at Annual School
- 10:30 – 12:00 Ballroom 2 ***Course #835 – “Is Your Community in Jeopardy”**
Dennis Mountain, Kathy Reed, Jim Podolak and Deborah Wagner, all from the Massachusetts Department of Revenue Bureau of Accounts, will test your Collector’s and Treasurer’s knowledge in Single Jeopardy, Double Jeopardy and Final Jeopardy.
- 12:00 Ballroom 2 **Closing of the Fifty Eighth Annual Conference** MCTA President

NOTICE: Hotel Check Out Time for Conference Attendees is Extended Until 12:00 Noon

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Education Committee

Nancy Holt – Treasurer/Collector, Marshfield, Chair
Elizabeth Craveiro, Treasurer/Collector, North Reading
Thomas Magno - Treasurer/Collector, Waltham
Richard Carmingani, Treasurer, Dudley
Holly Denault, Treasurer/Collector, Adams
John Duggan – Treasurer/Collector, West Bridgewater
Donald Kaminski - Treasurer/Collector, Oxford
Barbara Barry - Treasurer/Collector, Sturbridge
Dorothy Jenkins - Collector, Monson
Lane Kelly, Treasurer/Collector, Greenfield