

# MASSACHUSETTS COLLECTORS AND TREASURERS ASSOCIATION

## 54<sup>th</sup> ANNUAL SCHOOL - UNIVERSITY OF MASSACHUSETTS, AMHERST, MA AUGUST 12, 13, 14, 15 – 2025

### CLASS SCHEDULES - TUESDAY, AUGUST 12<sup>th</sup>, 2025

	TREASURER			COLLECTOR			CERTIFIED/ NOT REQUIRED (Anyone may attend)
	1st Year	2nd Year	3rd Year	1st Year	2nd Year	3rd Year	
9:00 to 10:00	<b>REGISTRATION &amp; CONTINENTAL BREAKFAST</b> <b>1<sup>ST</sup> Floor Concourse</b>						
9:45 to 10:15	<b>Orientation for First Year Attendees</b> M. Ronald Mendes, MCTA President Kat Forte, Executive Director						
9:45 to 10:15	<b>Treasurers &amp; Collectors – Preliminary Exam Review</b> (Preliminary review session for Course 900R and 950R reserved only for attendees taking the exam on Friday)  C. Pilla D. Lambert J. Russo						
10:30 to 12:30	<b>*101</b>  Duties & Responsibilities  J. Lepardo B. Barry C. Pilla L. Cole	<b>*408</b>  Ethics - Conflict of Interest  V. Giuliano C. Cox	<b>*418</b>  The Uniform Procurement Act Ch. 30B  T. Tefft L. Troast	<b>*160</b>  Duties & Responsibilities  E. McKay J. Nunes R. Fernandes	<b>*408</b>  Ethics - Conflict of Interest  V. Giuliano C. Cox	<b>*418</b>  The Uniform Procurement Act Ch. 30B  T. Tefft L. Troast	<b>1020</b>  Level up your MCTA Membership <i>Leadership – Participation – Professionalism</i>  MCTA Officers

12:30  
to  
1:45

### **LUNCH** **Auditorium**

1:45 to 3:15	<b>*102</b>  Cash Control Procedures  C. Pilla J. Russo C. Cox J. Minot	<b>*202</b>  Investments  M. Newcomb K. Cyganiewicz B. Callow M. Vose	<b>*401</b>  Tax Rate Recap- Free Cash- Cherry Sheet  A. Nelson D. Benvenuto	<b>*102</b>  Cash Control Procedures  C. Pilla J. Russo C. Cox J. Minot	<b>*268</b>  Betterments Assessments, Water, Sewer Liens  R. Mendes R. Carmignani Jr.	<b>*401</b>  Tax Rate Recap- Free Cash- Cherry Sheet  A. Nelson D. Benvenuto	<b>791</b>  Current Legal Topics and Other Topics in Public Finance  <b>Richard Manley, Partner</b> Troutman Pepper Locke <b>Todd Cooper, Partner</b> Troutman Pepper Locke <b>David Eisenthal</b> VP & Senior Fiscal Advisor Unibank Fiscal Advisory Svcs
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### **Members Dinner**

RSVP Required | \$35 per attendee

(Our generous sponsors are supplementing the remaining cost of this dinner.)

Limited Seats Available

5:30  
to  
8:00

**Open to All Registrants** – Join us for an evening of connection, good food, and celebration!  
Enjoy hors d'oeuvres followed by a full buffet dinner in the Student Union Ballroom (2nd Floor).

🕒 **Hors d'oeuvres: 5:30 PM – 6:30 PM**      🕒 **Dinner: 6:30 PM – 8:00 PM**

Follow the signs from the Campus Center's main 2nd floor concourse to the ballroom—no need to go outside!

\*\*\*Please note that required courses to sit for examination are marked with an asterisk\*\*\*

## CLASS SCHEDULES - WEDNESDAY, AUGUST 13<sup>th</sup>, 2025

	TREASURER			COLLECTOR			CERTIFIED/ NOT REQUIRED (Anyone may attend)
	1 <sup>st</sup> Year	2 <sup>nd</sup> Year	3 <sup>rd</sup> Year	1 <sup>st</sup> Year	2 <sup>nd</sup> Year	3 <sup>rd</sup> Year	
	<b>*105</b>  Cash Management  J. Lepardo L. Clark L. Cole	<b>*209A</b>  Advanced Payroll  C. Pilla D. Lambert C. Mayen E. Flemming	<b>304</b>  Online Banking Security & Fraud Prevention  A. Iwanczuk R. Mendes A. Mellet	<b>*161A</b>  Property Tax Collections  B. Barry S. Glowatsky	<b>*710</b>  Deputy Tax Collector Function & Relationship  R. Jeffery J. Morra R. Fernandes	<b>374</b>  Online Payments  S. Johnson L. Kuik D. Fonte C. Cincotta	<b>304</b>  Online Banking Security & Fraud Prevention  A. Iwanczuk R. Mendes A. Mellet

10:00 - 10:30

### REFRESHMENT BREAK

10:30 to 11:45	<b>*103A</b>  DOR's Relationship with the Treasurer  J. Crowley R. Fernandes	<b>*209B</b>  Advanced Payroll (cont'd)  C. Pilla D. Lambert C. Mayen E. Flemming	<b>*301</b>  Revenue Forecasting  N. Holt	<b>*161B</b>  Property Tax Collections (cont'd)  B. Barry S. Glowatsky	<b>*167</b>  Municipal Lien Certificates  R. Mendes D. Fonte	<b>*364</b>  Reconciling Tax Receivables  Z. Nowlan G. Carreiro C. Cox	<b>1022</b>  Hiring/Interviewing  <b>Mary Aicardi</b> <i>Senior Associate, Edward J. Collins, Jr. Center for Public Management</i>
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11:45am – 1:15pm

### LUNCH - Auditorium

1:15 to 2:30	<b>*104A</b>  Payroll  C. Pilla D. Lambert J. Minot	<b>*203A</b>  Long Term Borrowing  R. Mendes M. Meidinger N. Lehman	<b>*303A</b>  Capital Budgeting & Financing  C. McNerney L. Driscoll K. Tofuri	<b>*165</b>  Interest Calculation Workshop  J. Russo J. Duggan G. Carreiro J. Welch	<b>*361A</b>  Assessing Procedures  K. Stanley L. Troast	<b>*365</b>  Advanced Collection Issues: Deferrals, Exemptions, Abatements, Liens  L. Partridge L. Clark	<b>795</b>  Prop 2 ½ - History & Overview  N. Holt B. Hancock
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2:30 – 3:00pm

### REFRESHMENT BREAK

3:00 to 4:30	<b>*104B</b>  Payroll (cont'd)  C. Pilla D. Lambert J. Minot	<b>*203B</b>  Long Term Borrowing: Documentation Disclosure, and Ratings  R. Mendes D. Eisenthal A. Jeffers	<b>*303B</b>  Cap. Budget & Financing (cont'd)  C McNerney L. Driscoll K. Tofuri	<b>*162</b>  Motor Vehicle Excise  E. McKay L. Clark Z. Pierce	<b>*361B</b>  Assessing Procedures (cont'd)  K. Stanley L. Troast	<b>*370</b>  Advanced Interest Calculations  J. Russo J. Duggan G. Carreiro J. Welch	<b>1019</b>  Seasoned Treasurers/ Collectors: Test Your Skills  S. Lonergan M. Hill
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\*\*\*Please note that required courses to sit for examination are marked with an asterisk\*\*\*

## CLASS SCHEDULES - THURSDAY, AUGUST 14<sup>th</sup>, 2025

	TREASURER			COLLECTOR		
	1st Year	2nd Year	3rd Year	1st Year	2nd Year	3rd Year
8:30 to 10:00	*107  Tax Title & Interest Calculation Workshop  S. Kelley B. Barry	*108  Trust Funds  R. Mendes B. Hancock Z. Pierce	*211  Tax Foreclosures & Management of Tax Possessions  D. Coppola P. Zekos	*163A  Tax Takings  J. Coppola S. Glowatsky	*260A  Advanced Collection Issues: Bankruptcy & Litigating Tax Collections  J. Finnegan R. Kerwin	211  Tax Foreclosures & Management of Tax Possessions  D. Coppola P. Zekos

10:00 - 10:15

### MORNING BREAK

10:15 to 11:45	*103B  Bureau of Accounts Relationship with the Treasurer  T. Rassias J. Savignac	*207  Insurance – Chap. 32B  P. Haraden B. Hancock	775  Land of Low Value Foreclosures  K. Woodland N. Holt	*163B  Tax Takings (cont'd)  J. Coppola S. Glowatsky	*260B  Advanced Collection Issues: Bankruptcy & Litigating Tax Collections (cont.)  J. Finnegan R. Kerwin	799  Office Operations & Best Practices  L. Clark D. Lambert B. Barry
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12:00 - 1:00

### LUNCH – CAMPUS CENTER AUDITORIUM

1:00 to 2:30	*106  Short Term Borrowing  R. Mendes C. McNerney D. Eisenthal	306  Auditor's Relationship with Treasurer/ Collector  J. Piotrowski N. Holt	<u>900R</u>  <u>Treasurer</u> <u>Examination</u> <u>Review</u>  C. Pilla D. Lambert Z. Pierce J. Lepardo	*164  Tax Takings Forms Workshop  L. Clark J. Coppola C. Cincotta	306  Auditor's Relationship with Treasurer/ Collector  J. Piotrowski N. Holt	<u>950R</u>  <u>Collector</u> <u>Examination</u> <u>Review</u>  J. Russo J. Duggan G. Carreiro
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2:30 to 4:30	Exam Reviews are reserved for attendees taking the exam on Friday		<u>900R</u>  <u>Treasurer</u> <u>Examination</u> <u>Review</u> (cont'd)  C. Pilla D. Lambert Z. Pierce J. Lepardo	Exam Reviews are reserved for attendees taking the exam on Friday		<u>950R</u>  <u>Collector</u> <u>Examination</u> <u>Review</u> (cont'd)  J. Russo J. Duggan G. Carreiro
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## **CLASS SCHEDULES - FRIDAY, AUGUST 15<sup>th</sup>, 2025**

	<b>TREASURER</b>	<b>COLLECTOR</b>
<b>9:00 to 12:30</b>	<b>900</b>  <b>Treasurer Examinations</b>	<b>950</b>  <b>Collector Examinations</b>

**Special thanks to our faculty and program sponsors for making our 54<sup>th</sup> Annual School a success!**

### **MCTA Officers & Staff (2025-2026)**

President	Ronald Mendes, Treasurer/Collector - City of Newton
1 <sup>st</sup> Vice President	Barbara Hancock, Collector/Treasurer - Town of Wilbraham
2 <sup>nd</sup> Vice President	Joanne Russo, Treasurer/Collector – Town of Dover
3 <sup>rd</sup> Vice President	Lisa Clark, Treasurer/Collector – Town of Hanson
Treasurer	Joanne Savignac - Municipal Consultant
Secretary	Jane Lepardo - Municipal Consultant
Executive Director	Kat Forte

### **Education Committee (2025-2026)**

Dean, 54<sup>th</sup> MCTA Annual School: Ronald Mendes, MCTA President, Treasurer/Collector - City of Newton  
Lisa Clark (Chair), Treasurer/Collector – Town of Hanson  
Christopher Pilla (Vice-Chair), Treasurer/Collector - Town of Milford  
Richard Carmignani, Treasurer/Collector - Town of Dudley  
Cheri Cox, Treasurer/Collector – Town of Boylston  
Diana Lambert, Assistant Treasurer - City of Newton  
Gary Carreiro, Finance Director/Treasurer-Collector - Town of Dartmouth  
Julie Venerus, Assistant Treasurer/Collector – Town of Taunton  
Deb Morin, Retired, Former Treasurer/Collector/Finance Director for Avon

### **Annual School Subcommittee (2025-2026)**

Chris Pilla (Chair), Treasurer/Collector –Town of Milford  
Diana Lambert, Assistant Treasurer - City of Newton  
Jennifer LaFountain, Treasurer/Collector – Town of Amherst  
Zoe Pierce, Treasurer/Collector – Town of Weston  
Jody Kurczy, Finance Director – Town of Millis  
Brooke Johnson, Assistant Treasurer – Town of Amherst  
Dawn Fonte, Treasurer/Collector – Town of East Longmeadow  
Erica Flemming, Treasurer/Collector – Town of Bourne  
Lisa Clark, Treasurer/Collector – Town of Hanson  
Ronald Mendes, Treasurer/Collector - City of Newton

### **\*Classroom Location Notes:**

Any room number that begins with 'ILC' takes place in the Integrative Learning Center, a building next to the Campus Center  
The Amherst Room is on the 10<sup>th</sup> floor of the Campus Center  
The Marriott Center is on the 11<sup>th</sup> floor of the Campus Center