

MASSACHUSETTS COLLECTORS AND TREASURERS ASSOCIATION

54th ANNUAL SCHOOL - UNIVERSITY OF MASSACHUSETTS, AMHERST, MA AUGUST 12, 13, 14, 15 – 2025

CLASS SCHEDULES - TUESDAY, AUGUST 12th, 2025

	TREASURER			COLLECTOR			CERTIFIED
	1st Year	2nd Year	3rd Year	1st Year	2nd Year	3rd Year	
9:00 to 10:00	REGISTRATION & CONTINENTAL BREAKFAST 1 ST Floor Concourse						
9:45 to 10:15	Orientation for First Year Attendees M. Ronald Mendes, MCTA President Kat Forte, Executive Director						
9:45 to 10:15	Treasurers & Collectors – Preliminary Exam Review (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	*101 Duties & Responsibilities J. Lepardo B. Barry A. Duggan	*408 Ethics - Conflict of Interest V. Giuliano C. Cox	*418 The Uniform Procurement Act Ch. 30B T. Tefft L. Troast	*160 Duties & Responsibilities E. McKay J. Nunes R. Fernandes	*408 Ethics - Conflict of Interest V. Giuliano C. Cox	*418 The Uniform Procurement Act Ch. 30B T. Tefft L. Troast	1020 Level up your MCTA Membership <i>Leadership – Participation – Professionalism</i> MCTA Officers

12:30
to
1:45

LUNCH **Auditorium**

1:45 to 3:15	*102 Cash Control Procedures C. Pilla J. Russo C. Cox J. Minot	*202 Investments M. Newcomb K. Cyganiewicz B. Callow M. Vose	*401 Tax Rate Recap- Free Cash- Cherry Sheet A. Nelson C. Ketchen	*102 Cash Control Procedures C. Pilla J. Russo C. Cox J. Minot	*268 Betterments Assessments, Water, Sewer Liens R. Mendes R. Carmignani Jr.	*401 Tax Rate Recap- Free Cash- Cherry Sheet A. Nelson D. Benvenuto	791 Current Legal Topics and Other Topics in Public Finance Richard Manley, Partner Troutman Pepper Locke Todd Cooper, Partner Troutman Pepper Locke David Eisenthal VP & Senior Fiscal Advisor Unibank Fiscal Advisory Svcs
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5:30
to
8:00

Members Dinner – Hosted by our MCTA Sponsors
RSVP REQUIRED! You will be invoiced for the cost of dinner if you RSVP and do not attend.
Open to All Registrants - Hors d'oeuvres and buffet dinner served-
Student Union Ballroom – 2nd Floor (Insert directions here)
Hors d'oeuvres: 5:30-6:30 Dinner: 6:30-8:00

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

CLASS SCHEDULES - WEDNESDAY, AUGUST 13th, 2025

	TREASURER			COLLECTOR			CERTIFIED
	1 st Year	2 nd Year	3 rd Year	1 st Year	2 nd Year	3 rd Year	
	*105	*209A	304	*161A	*710	374	304
8:30 to 10:00	Cash Management J. Lepardo L. Clark A. Duggan	Advanced Payroll C. Pilla D. Lambert C. Mayen E. Flemming	Online Banking Security & Fraud Prevention A. Iwanczuk R. Mendes	Property Tax Collections B. Barry S. Glowatsky	Deputy Tax Collector Function & Relationship R. Jeffery J. Morra R. Fernandes	Online Payments S. Johnson L. Kuik D. Fonte C. Cincotta	Online Banking Security & Fraud Prevention A. Iwanczuk R. Mendes

10:00 - 10:30

REFRESHMENT BREAK

10:30 to 11:45	*103A DOR's Relationship with the Treasurer J. Crowley R. Fernandes	*209B Advanced Payroll (cont'd) C. Pilla D. Lambert C. Mayen E. Flemming	*301 Revenue Forecasting N. Holt C. Sweet	*161B Property Tax Collections (cont'd) B. Barry S. Glowatsky	*167 Municipal Lien Certificates R. Mendes D. Fonte	*364 Reconciling Tax Receivables Z. Nowlan G. Carreiro C. Cox	1022 Hiring/Interviewing Mary Aicardi <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	*104A Payroll C. Pilla D. Lambert J. Minot	*203A Long Term Borrowing R. Mendes M. Meidinger N. Lehman	*303A Capital Budgeting & Financing C. McNerney L. Driscoll K. Tofuri	*165 Interest Calculation Workshop J. Russo J. Duggan G. Carreiro	*361A Assessing Procedures K. Stanley L. Troast	*365 Advanced Collection Issues: Deferrals, Exemptions, Abatements, Liens TBD L. Clark	795 Prop 2 ½ - History & Overview N. Holt B. Hancock
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2:30 – 3:00pm

REFRESHMENT BREAK

3:00 to 4:30	*104B Payroll (cont'd) C. Pilla D. Lambert J. Minot	*203B Long Term Borrowing: Documentation Disclosure, and Ratings R. Mendes D. Eisenthal A. Jeffers	*303B Cap. Budget & Financing (cont'd) C McNerney L. Driscoll K. Tofuri	*162 Motor Vehicle Excise E. McKay L. Clark Z. Pierce	*361B Assessing Procedures (cont'd) K. Stanley L. Troast	*370 Advanced Interest Calculations J. Russo J. Duggan G. Carreiro	1019 Seasoned Treasurers/ Collectors: Test Your Skills S. Lonergan C. Sweet M. Hill
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CLASS SCHEDULES - THURSDAY, AUGUST 14th, 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 C. Pilla	*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 J. Minot 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 B. Arrigal T. Rassias	306 Auditor's Relationship with Treasurer/Collector J. Piotrowski N. Holt	900R <u>Treasurer Examination Review</u> C. Pilla D. Lambert J. Minot J. Lepardo	*164 Tax Takings Forms Workshop L. Clark A. Duggan C. Cincotta	306 Auditor's Relationship with Treasurer/Collector J. Piotrowski N. Holt	950R <u>Collector Examination 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		900R <u>Treasurer Examination Review (cont'd)</u> C. Pilla D. Lambert J. Minot J. Lepardo	Exam Reviews are reserved for attendees taking the exam on Friday		950R <u>Collector Examination Review (cont'd)</u> J. Russo J. Duggan G. Carreiro
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CLASS SCHEDULES - FRIDAY, AUGUST 15th, 2025

	TREASURER	COLLECTOR
9:00 to 12:30	900 Treasurer Examinations	950 Collector Examinations

Special thanks to our faculty and program sponsors for making our 54th Annual School a success!

MCTA Officers & Staff (2025-2026) **To be updated**

President	M. Ronald Mendes, Treasurer/Collector - City of Newton
1 st Vice President	
2 nd Vice President	
3 rd Vice President	
Treasurer	Joanne Savignac - Municipal Consultant
Secretary	Jane Lepardo - Municipal Consultant
Executive Director	Kat Forte

Education Committee (2025-2026) **To be updated**

Dean, 53rd MCTA Annual School: M. Ronald Mendes, MCTA President, Treasurer/Collector - City of Newton
____ (Chair), Treasurer/Collector – Town of _____
____ (Vice-Chair), Treasurer/Collector - Town of _____
Richard Carmignani, Treasurer/Collector - Town of Dudley
Cheri Cox, Treasurer/Collector – Town of Boylston
Diana Lambert, Assistant Treasurer - City of Newton
Mindy Ernst-Fournier, Treasurer - Town & County of Nantucket
Gary Carreiro, Finance Director/Treasurer-Collector - Town of Dartmouth
Julie Venerus, Assistant Treasurer/Collector – Town of Taunton
Jessica Minot, Treasurer/Collector - Town of Grafton
Deb Morin, Finance Director, Treasurer/Collector – Town of Avon
Dawn Fonte, Treasurer/Collector – Town of East Longmeadow

Annual School Subcommittee

M. Ronald Mendes (Chair), Treasurer/Collector – City of Newton
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
Kerri Bertone, CFO – Town of Franklin

***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 10th floor of the Campus Center
The Marriott Center is on the 11th floor of the Campus Center