



FEBRUARY 10-12
DAVENPORT HOTEL

2026 Annual Meeting

SPOKANE, WA

Expert Edge: Professional Insights to Empower Association Management Companies



Dan Barnes, CPA – Partner, Barnes, Givens and Barnes

Michael Deese – Partner, Pannos Law, LLC

Marc Labadie, CFP, AIF, MPAS – Executive Vice President, RTD Financial

Megan Woodburn, CAE – Founder and CEO, Strategic Association Management (SAM)



Expert Insight: CPA

Dan Barnes

Partner

Barnes, Givens and Barnes



CPA's 30 Day, 90 Day & 12 Month Plan Recommendation



30-Day Plan — Financial Clarity

In the first 30 days, get financial clarity. Make sure your numbers are timely, accurate, and actually reviewed—because you can't fix what you can't see

90-Day Plan — Discipline & Governance

By 90 days, formalize decision-making. A clear budget, defined approval authority, and regular financial reviews prevent cash surprises and owner conflict.

12-Month Plan — Strategic Value

At 12 months, shift from compliance to strategy—strengthen controls and align the financial structure with long-term values and path towards fulfilling the mission of the organization.





Expert Insight: Investment Advisor

Marc Labadie

Executive Vice President

RTD Financial



Investment Advisor's 30 Day, 90 Day & 12 Month Plan Recommendation



30-Day Plan — Review Client Budgets

Review every client budget to identify and ensure all investment activities are presented “below the line” to ensure the budget and operating performance is not overstating the operating health of the organization.

90-Day Plan — Reserve & Investment Policy

Review every client Reserve & Investment Policy to see if they are missing governance around targeted ranges for reserves.

12-Month Plan — Engage a Financial Advisor

Develop approved list of trusted financial advisors for clients to interview who need support in developing these reserve targets and long-term savings plans.



Expert Insight: Attorney

Mike Deese

Partner

Pannos Law, LLC



Attorney's 30 Day, 90 Day & 12 Month Plan Recommendation



30-Day Plan — Client Registration Audit

Review all client state registration requirements and make/correct registration filings as necessary.

90-Day Plan — Executive Director Training

Review internal executive director training procedures and content and revise/enhance as necessary.

12-Month Plan – Board Onboarding / Training

Review client board training/orientation procedures and content and revise/enhance as necessary.



QUESTIONS?

