

# West Coast Comprehensive Institutions (WCCI) 2017 Annual Meeting Agenda

## Monday, March 27, 2017

- 10:30 a.m. – 11:30 a.m.** **University of La Verne Walking Tour – Optional**  
Meet in front of Campus Center  
**Tour conducted by:**  
*Clive Houston-Brown, Vice President of Facilities & Technology*
- 12:30 p.m. - 1:30 p.m.** **Registration – Campus Center, Ballroom A**
- 1:30 p.m. - 2:00 p.m.** **Welcome and Introductions**
- 2:00 p.m. - 3:30 p.m.** **WCCI Financial Ratios**  
**Prager & Co., LLC – Speakers:**  
*Saul Rosenbaum, Managing Director*  
*Ian Prager, Director*  
*Fritz Weis, Consultant*
- 3:30 p.m. - 3:45 p.m.** **Break**
- 3:45 p.m. - 5:15 p.m.** **Economic Update and Policy Implementation**  
**Wells Fargo – Speaker:**  
*Eugenio Aleman, Senior Economist, Wells Fargo*
- 5:30 p.m.** **Return to Sheraton Fairplex**
- 6:00 p.m. - 8:30 p.m.** **Dinner at the FARM – (Los Angeles County Fairgrounds)**  
Sheraton Fairplex Hotel and Conference Center  
**Location:** 601 W. McKinley Avenue  
Pomona, CA 91768  
  
Walk over or take the Hotel Shuttle from the main entrance of the hotel to the FARM.

## Tuesday, March 28, 2017

- 7:30 a.m. - 8:00 a.m.** **Breakfast at University of La Verne – Campus Center Ballroom A**
- 8:00 a.m. - 9:30 a.m.** **New Accounting Standards Update**
  - What is applicable for FY17
  - What to look forward to**Impending tax reform**  
**Form 990 and other filing Changes**  
  
**Grant Thornton – Speakers:**  
*Rick Wentzel, Audit Partner, West Region Not-for-Profit Practice Leader*  
*Rosemarie Brown, Tax Director, California NFP Tax Practice Leader*
- 9:30 a.m. - 9:45 a.m.** **Break**
- 9:45 a.m. – 11:00 a.m.** **“Brandman University – Innovation and the Competency Education Learning Journey”**  
**Brandman University – Speakers:**  
*Gary Brahm, Chancellor*  
*Phillip Doolittle, Executive Vice Chancellor of Finance & Administration/CFO*
- 11:00 a.m. - 12:15 p.m.** **Finances in Retirement: The New Retirement Lifescape Including the Results of a Study Conducted by Age Wave and Merrill Lynch**  
**Bank of America Merrill Lynch – Speakers:**  
*Sandra Lewandowski, Vice President, Workforce Financial Solutions*  
*Dennis Walston, Director, Workforce Financial Solutions*
- 12:15 p.m. - 1:30 p.m.** **Open Roundtable/2018 WCCI Planning/Lunch**