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gfoaalberta
government finance officers association

**GENERAL
LEDGER**

Monthly e-Newsletter

Message from the Executive Director

Welcome to a new year with GFOA Alberta! We're excited for what lies ahead in 2026. We have a strong slate of professional development opportunities planned over the coming months, including webinars, the CRA series, and our new **Bootcamp sessions** covering AI and Excel, designed to deliver practical, relevant learning for finance professionals at every level, and all while earning CPD credits.

Hopefully you all had a rejuvenating holiday break and braved the weather to celebrate with friends and family. My new year's resolution this year is to get better at pretending to know the words to "Auld Lang Syne".

Annual membership renewal emails were sent on January 2, and we sincerely thank everyone who has already renewed. This year also marks an exciting enhancement to member value, with the option to add a GFOA of the US and Canada membership at a significant discount. This partnership gives GFOA Alberta members expanded access to international learning, research, and networking, while strengthening the professional community you're part of.

We're also looking ahead to our Annual Conference in Calgary, May 19–22, and it's already shaping up to be another exceptional event. Watch for conference registration opening soon. New this year, we'll be offering a pre-conference workshop, and please note that the conference schedule runs Tuesday to Friday. With Monday being a statutory holiday, it's the perfect opportunity to use that day as a travel window.

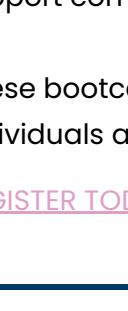
Also, remember if you get a group together for training we would be happy to arrange a speaker and provide group rates to make it easier on your training budget.

Thank you for your continued support, engagement, and commitment to excellence in municipal finance. We look forward to a productive, collaborative, and inspiring year ahead with you.

Rick Wojtkiw
Executive Director

ONLINE WEBINAR

Investment Policy Development

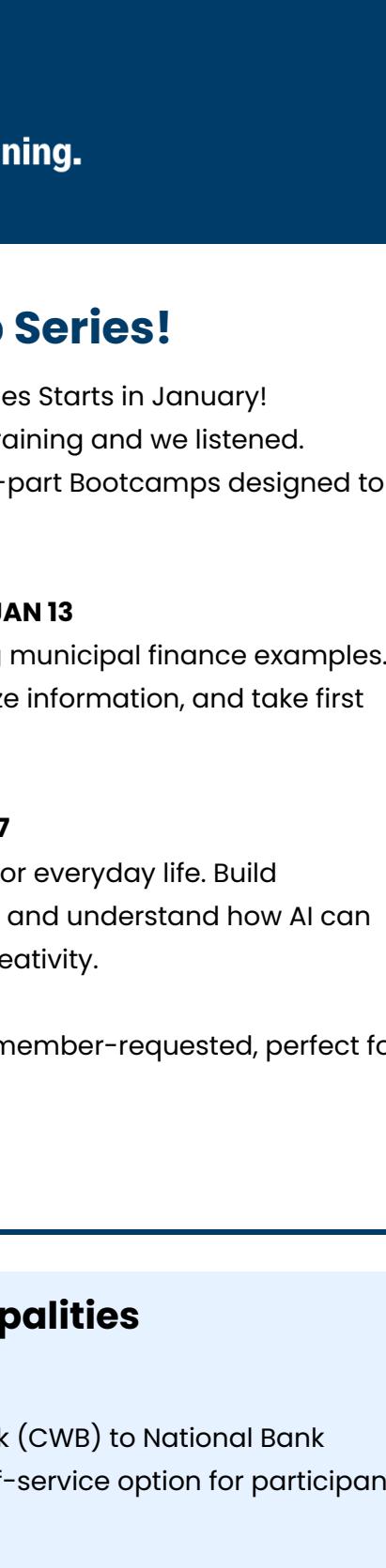


Jan 15, 2026
10:00 - 11:00AM

REGISTER



www.gfoa.ab.ca



Presented by
James Hobson & Charet Chahal



HOBSON CHAHAL ADVISORY GROUP
WOOD GUNDY

Investment Policy Development: Jan 15

The Investment Policy Statement (IPS) is a document that provides guidance for the investment objectives, restraints, and parameters for the creation and management of a municipality's investment portfolio. The IPS is the blueprint for the municipal investment management process. By clearly laying out all relevant goals, guidelines, and restrictions, a well-written IPS equips the investment manager to build a portfolio that maximizes return while minimizing risk. Additionally, an important benefit of an IPS is the layer of objectivity that it adds to the investment process.

Participants can expect to:

- Learn from industry leading specialists who have created policies for over 100 Canadian municipalities and institutions
- Learn how the IPS sets the framework for how municipal funds are managed, including legal constraints, risk tolerance, and permitted investments
- Gain the knowledge to needed to evaluate whether investment decisions align with the policy, empowering staff to provide effective oversight and promote responsible stewardship of public funds
- Discover how a well-crafted IPS supports long term-financial planning by aligning investment goals with municipal priorities (e.g., liquidity needs, capital projects), leading to more sustainable and efficient use of resources

[REGISTER TODAY](#)

New!

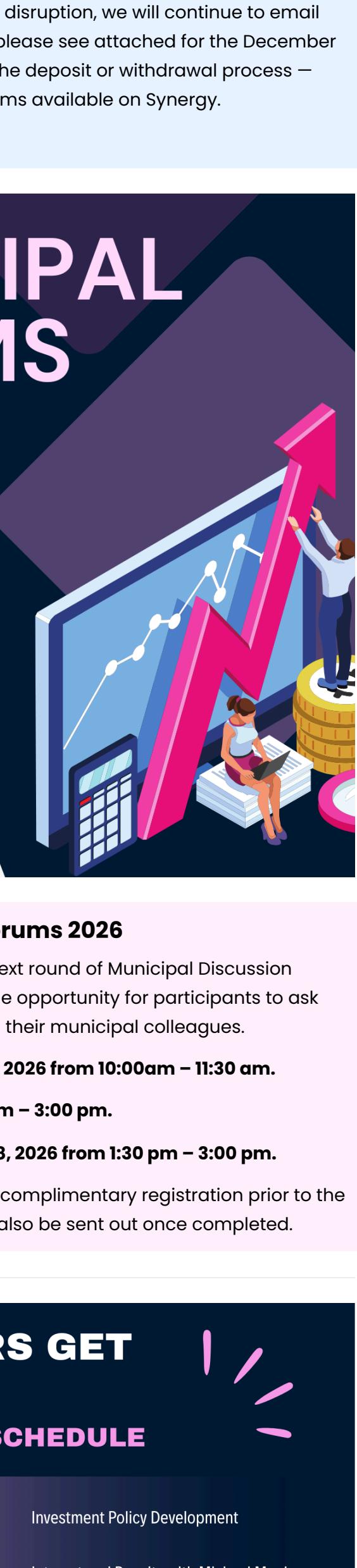
BOOTCAMP SERIES



Two NEW 4-Part Bootcamps:

- **Excelling in Excel**
- **Everyday AI**

Starting January — practical training.



NEW Bootcamp Series!

► **NEW for 2026: GFOA Alberta Bootcamp Series Starts in January!** You asked for more hands-on, skill-building training and we listened.

This January, we're launching two practical 4-part Bootcamps designed to build confidence and real-world capability.

► **Excelling in Excel (4-Part Series) STARTS JAN 13** From fundamentals to power-user skills using municipal finance examples. Learn to structure data, build formulas, analyze information, and take first steps toward workflow automation.

► **Everyday AI (4-Part Series) STARTS JAN 27** A gentle, beginner-friendly introduction to AI for everyday life. Build confidence, explore safe and responsible use, and understand how AI can support communication, organization, and creativity.

► **These bootcamps are short, accessible, and member-requested, perfect for individuals and teams.**

[REGISTER TODAY](#)

HISA News from Alberta Municipalities

As the transition from Canadian Western Bank (CWB) to National Bank continues, National Bank is still finalizing a self-service option for participants to access their HISA statements directly.

In the meantime, to ensure there's no disruption, we will continue to email your monthly statements as usual — please see attached for the December statement. There are no changes to the deposit or withdrawal process — please continue using the existing forms available on Synergy.

Municipalities Over 10K: February 18, 2026 from 10:00am – 11:30 am.

Rurals: February 18, 2026 from 1:30 pm – 3:00 pm.

GFOA will be sending out a link to the complimentary registration prior to the forum date and a forum agenda will also be sent out once completed.

MUNICIPAL FORUMS

What a great turnout, we had to the forums, engaging discussions, problem solving, such solid community of finance professionals.

Watch for the next Municipal Forum dates in early 2026

WHAT'S ON YOUR RADAR?

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Does your team have a training need?

Is there a challenge your municipality is facing or a topic you'd love more training on?

Let us know! Your input helps shape our upcoming webinars, workshops, and conference content. Email

communications@gfoa.ab.ca

Contact Us

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GFOA Alberta

Box 30176, Markville, ON, N0B 1S1

Mon-Fri 8:30am-4:30pm, Sat 9:00am-12:00pm, Sun 12:00pm-4:00pm

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