



The Institute of
Internal Auditors

Philadelphia

Member **NEWSLETTER**

Spring 2022, Issue #22-1

Newsletter Chair:

Sean McErlean

President's Message



Dear Philadelphia Chapter Member -

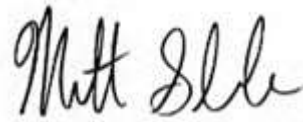
I hope this finds you well. First and foremost, I wanted to thank our past-President, Ryan Egan, for his unwavering leadership and support as we navigated our way through an uncertain year. As it was a challenging year for all, Ryan was able to keep our chapter leadership team focused on what mattered the most: providing value to our members. Please join me in

thanking Ryan as he moves out of the President role and onto the Board of Governors in his "Ex-Officio" role.

Reflecting on the past year, I can't help but think back to Ryan's use of "resiliency" in his previous President's Message. When we initially started planning for the chapter year, we were unsure what kind of value-add and learning opportunities we would be able to provide our members. It seemed at every corner we were facing limitations and hurdles stemming from the pandemic. Keeping in mind the health and safety of our members, we knew that we would have to pivot and to be flexible in order to be able to provide the valuable learning and networking events that the Philadelphia Chapter has grown accustomed to. I'm happy to report that with the help of our generous sponsors, the many volunteers along the way, and our supportive membership, we were able to provide 45 CPEs spanning across eight events hosted both virtual and in-person!

As we look forward to the 2022-2023 chapter year, we can't help to be excited as we continue to move forward with our flexible event scheduling. With virtual and in-person events scheduled already (and more to come), we look forward to getting back in front of our members to provide the same high-quality content and networking opportunities that we always have. Furthermore, we look forward to continuing the advancement of our various committees such as the Diversity Equity & Inclusion Committee and the Academic Relations Committee.

If you are interested in getting more involved in the chapter, please reach out to me at president@phillyiia.org so we can get you introduced to the team! I look forward to meeting and getting to know everyone at our upcoming events.



Matt Skala
President, Philadelphia IIA Chapter

2021-2022 Annual Events Report

'21-22 Events Summary			
Date	Event/Topic Location	CPE	# of Attendees
September 20, 2021	Fraud Cases & Solutions for Auditors <i>Virtual</i>	8	51
October 28, 2021	Agile Auditing <i>Virtual</i>	8	59
November 22, 2021	Fall Conference – The Auditor Behind the Mask <i>Virtual</i>	8	248
December 6, 2021	Ethics <i>Virtual</i>	2	96
January 24, 2022	Cyber at the Cyber <i>Virtual</i>	8	69
February 16, 2022	Workpaper Documentation <i>Virtual</i>	2	111
March 24, 2022	ERM – Get in the Middle <i>Virtual</i>	1	50
April 22, 2022	Spring Summit – The Next Chapter <i>In-Person</i>	8	196

Fraud and Internal Controls Case Competition Event Spotlight



The eighth annual Fraud & Internal Controls Case Competition (FIC3) was

held in February 2022. This event, hosted by Drexel University and co-sponsored by the Philadelphia Chapter of the IIA and Mercadien, attracted nearly over 50 students across 8 schools in the Philadelphia area. With safety in mind, the case competition continued to be a virtual event where students presented their cases to a panel of current internal audit practitioners. The Chapter's Academic Relations Committee continues to expand on their partnership with members of the Drexel Accounting department to develop the annual case competition and to spread overall awareness of the internal audit profession to local university students.

The 2022 FIC3 kicked off on February 7, 2021 with a general overview of the competition as well as pointers and tips provided by Drexel accounting department. This year's case focused on the issue of tangled titles, which has been a focus of the Philadelphia City Comptroller's office in recent years. Tangle titles occur when the primary resident and caretaker of a home is not the legal owner, occurring most often when a homeowner has died without the appropriate will and estate creation to properly transfer the deed of the house. Without the appropriate transfer of ownership, a relative cannot sell the home, borrow money under a mortgage or apply for tax credits in addition to other homeownership benefits. Tangled titles

disproportionally impacts lower income families in the city. It also impacts any generational wealth that has been attained through home ownership. The case provided an opportunity for students to learn about internal audit concepts while also applying those concepts to real world examples impacting our city. The case was written by Drexel accounting department personnel.

Competition day, February 11, 2022, began with a presentation from Tracey L. Gordon, Philadelphia's first African American Register of Wills. Tracey shared some of the details around how she came into public service and her mission to help educate the importance of having a will to pass your wealth and property onto future generations. She shared some of the ways that her office is working to implement probate reform and increase the diversity within Philadelphia's public offices. Her office is working tirelessly to fix the Tangled Title crisis within Philadelphia and improve the quality of Philadelphia's life. Each team were then tasked with putting together a PowerPoint evaluating the current state of internal controls and demographic implications related to Tangled Titles. The students were also provided a current internal audit practitioner as a coach to help guide them in their preparation. Ultimately, each of the teams presented to a panel of experienced internal audit practitioners with the top six teams taking away a cash prize. The top prize went to a group of students from Eastern University. Thank you to all the volunteers from the local chapter that helped put on another great event!

Upcoming Chapter Events – Save the Date

July 27, 2022	Member Appreciation Event (Citizen’s Bank Park, Philadelphia)
August 23-24, 2022	8 CPE - Fraud Seminar (Virtual)
September 26-27, 2022	8 CPE - Critical Interpersonal and Communications Soft Skills for Auditors (Virtual)
October 2022	2 CPE – ESG (Virtual)
November 21, 2022	Fall Conference
December 5, 2022	2 CPE – Ethics (Virtual)

Stay informed about upcoming programs by following the Philadelphia IIA Chapter on social media.



[@IIAPhiladelphia](https://twitter.com/IIAPhiladelphia)



<http://www.linkedin.com/company/institute-of-internal-auditors-philadelphia-chapter>

Member Anniversaries & Certifications

The Philadelphia IIA Chapter would like to recognize and thank our long-standing members. Please join us in thanking the following members:

<p>50 Years Ralph Purpur (Feb 1972)</p> <p>40 Years Joel Schiller (Apr 1982)</p> <p>35 Years Jeffrey Roundtree (Mar 1987)</p> <p>30 Years Linda Fonner (Mar 1992) Robert Emrich (June 1992) Jamal Ahmed (Sept 1992) John Mayer (Oct 1992)</p> <p>25 Years Monica DeBellis (Jan 1997) Robert Brunt (Jan 1997) Daniel Tucci (Feb 1997) Andrew Duda (June 1997) Pieter Bezuidenhout (Aug 1997) Christine Wesztergom (Aug 1997) G. Stephen Large (Oct 1997) Raymond Lukas (Oct 1997)</p> <p>20 Years Joseph Steinmetz (Jan 2002) John Ross (Jan 2002) Shirley Alonzo (Feb 2002) Arnold DeLeon (Feb 2002) Mindy Zimri (Feb 2002) Marnell Kleynhans (Mar 2002) Gregory Coverdale (Mar 2002) Colleen Bransfield (Apr 2002) Patrick Killeen (May 2002) David Small (May 2002) Sharon Hough (May 2002) Faizal Chaudhury (June 2002) Laurence Winegar (June 2002) Phillip Verticelli (June 2002) Americo Ricci (July 2002) John Price (July 2002)</p>	<p>20 Years (continued) Julio Arevalo (July 2002) Daniel Caruso (Aug 2002) Karen Johnston (Aug 2002) Luis Baptista (Aug 2002) Andrea Matheny (Aug 2002) Timothy Ryan (Aug 2002) James Frank (Aug 2002) Patricia Furbank (Sep 2002) Douglas Hallett (Sep 2002) Kimberly Wensel (Oct 2002) James Cabrey (Dec 2002) Reuben Shaffer (Dec 2002)</p> <p>15 Years Jennifer Malatesta-Johnson (Jan 2007) Erin Evans-Anke (Jan 2007) Jakub Petersson (Jan 2007) William Bardowski (Jan 2007) John Cutrona (Jan 2007) John Huyette (Jan 2007) Jamila Sefiane (Jan 2007) Jennifer McCloskey (Feb 2007) Patrick Czwarnog (Feb 2007) John Manzi (Feb 2007) Allen Varughese (Feb 2007) FATIMA Khan (Feb 2007) Dale Venturini (Feb 2007) Irina Balashova (Feb 2007) Timothy Carfrey (Feb 2007) Avakash Patel (March 2007) Adam Ross (March 2007) William Sullivan (March 2007) Devon Brown (March 2007) Melissa Hammond (March 2007) Michael Manzi (March 2007) Trish Savitsky (March 2007) Wee Yian Tay (March 2007) Robert Frye (Apr 2007) Robert Weaverling (Apr 2007)</p>	<p>15 Years (continued) Gregory Healy (Apr 2007) Kaitlyn Kramer (Apr 2007) Cynthia Papas (Apr 2007) Maureen McCue (Apr 2007) Diana Ran (Apr 2007) Donna Gallo (May 2007) James Stoltz (May 2007) Borey Yem (Jun 2007) Kelly Hagopian (Aug 2007) Karl Krohn (Aug 2007) William Michael (Aug 2007) Ashlinn Groff (Aug 2007) Dorothy Sharchuk (Aug 2007) Christopher Salmon (Sep 2007) Robert Bailey (Sep 2007) Briana Skiles (Sep 2007) Angelique Stoney-Siplin (Sep 2007) Robert Ternay Jr (Sep 2007) Emily Bristol (Oct 2007) Tara-Ann Dieckhaus (Oct 2007) Nicole Maier (Oct 2007) Tiffany Yordan (Oct 2007) Natasha Holter (Oct 2007) Edward Baker (Oct 2007) Terence Williams (Oct 2007) Shawn Manderson (Oct 2007) Justin Levin (Oct 2007) Christine Dwyer (Nov 2007) Donna Ragan (Nov 2007) Jeffrey Sorin (Nov 2007) Jacob Gregg (Nov 2007) Ken Brzozowski (Nov 2007) Andrea Tranchik (Nov 2007)</p> <p>10 Years Vincent Martino Jr. (Jan 2012) Thomas DeBolt (Jan 2012) Jennifer Filko (Feb 2012) Lynette Lee (Feb 2012) Jonathan Burns (Feb 2012) Stacey Rae Elliott (Feb 2012)</p>
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Member Anniversaries (continued)

The Philadelphia IIA Chapter would like to recognize and thank our long-standing members. Please join us in thanking the following members:

<i>10 Years (continued)</i> Stacey Rae Elliott (Feb 2012) Sean McErlean (Feb 2012) Matthew Lanahan (Mar 2012) Daniil Krivov (Mar 2012) Michael Levy (Mar 2012) Steven Matus (Mar 2012) Laura Judy (Mar 2012) John Moerman (Mar 2012) Oluwakemi Ajayi (Apr 2012) Joseph Strain (Apr 2012) Matthew Denton (Apr 2012) Erika LaMarch (Apr 2012) Christian Nunes (May 2012) Olga Negoreva (May 2012) Christopher Weidman (May 2012) Felipe Barreiros (June 2012) Lijun Xu (June 2012) Brian Murphy (June 2012) Kimberly Ligmanowski (June 2012) Brittney Matyas (June 2012) Rich Sowalsky (June 2012) Elijah Adams (June 2012) Eric Bendin (June 2012) George Corsack (June 2012) Bridget Keller (June 2012) Atilua Bailey (June 2012) Jamayssar Persaud (June 2012) Larry Hargrove (June 2012) Amanda Kenny (June 2012) Brian Christiansen (Jul 2012) Dina Serhiayenka (Jul 2012) Christopher Garrity (Aug 2012) John Imszennik (Aug 2012) Danielle Seeling (Aug 2012) Glynis Sumauang (Sep 2012) Natalie Peck (Sep 2012) Erin Thornton (Sep 2012) Daniel Marcu (Oct 2012) Robert Farber (Oct 2012) Christopher Oswald (Nov 2012) Derek Hamilton (Dec 2012) Nancy Perilstein (Dec 2012) Michael Brooks (Dec 2012)	<i>10 Years (continued)</i> Kenneth Johnson (Dec 2012) Kozeta Matejik (Dec 2012) Nathaniel Sives (Dec 2012)
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Certifications



to the following Philadelphia IIA Chapter members on their recent IIA certifications!!

Certified Internal Auditor (CIA)

Craig Cassidy

Ali Ikram

Remo Mazzoleni

Megan Henkel

Julio Arevalo

Qian Wang

Matthew Fish

Sijia Zhou

Rachel Eshleman

Malgorzata Grzybek

Craig Karch

James Showell

Esther Obasi

Ann Isabelle Allgood-Neal

Jennifer Bouton

Galina Amantayeva

Marusz Chodubski

Vireli Rios Guisao

Xiangyu Lv

Tai Ming Wong

Certification in Risk Management Assurance (CRMA)

Bryan Henry

Ejaz Hosein

Highlights from the Spring Summit

Thank you to our volunteers and members on making our first in-person event in over 2 years a success. Here are some pictures from Spring Summit 2022:



The Institute of
Internal Auditors
Philadelphia

**Ryan Egan,
Philly Chapter President**

kicks us off
for our 1st in
person conference
in 2 years!



**KEYNOTE SPEAKER
REBECCA RYNHART**

**PHILLY IIA SPRING SUMMIT
2022**



The Institute of
Internal Auditors
Philadelphia

*Philly IIA Spring Summit
Closing Keynote:*

**Laura Soileau
Chair of North American
Board, IIA**

Congratulations to our Elected Chapter Leadership

At the 2022 Spring Summit, the membership voted in the nominated slate of Officers and Board Members. Congratulations to all elected!! The Officers for Philadelphia Chapter of the IIA 2022-2023 Chapter year are:



Chapter President
Matt Skala, Dorman Products



**Chapter 3rd Vice President
(Chair of Membership)**
Lindsay Bell, Vanguard



**Chapter 1st Vice President
(Chair of Programs)**
Sean McErlean, Grant
Thornton



Chapter Treasurer
Frank Macciocca, Lansing
Board of Water & Light



**Chapter 2nd Vice President
(Chair of Communications)**
Jillian Zerillo, EY



Chapter Secretary
Maeve Raak, Protiviti



New Officer Member Spotlight

Jillian Zerillo



Jillian is a Business Consultant with EY, specializing in Internal Audit and Enterprise Risk Management (ERM). Before joining EY in April 2022, Jillian spent the past six years at the Children's Hospital of Philadelphia (CHOP)

within Internal Audit leading operational and financial audits/projects and serving as a trusted advisor to leadership of one of the leading pediatric hospitals and research facilities in the world. She began her career at PwC (NYC) within their Risk Assurance practice.

Jillian holds a Bachelor of Science degree in Accounting and a Masters of Business Administration (MBA) from St. John Fisher College (Rochester, NY). Jillian is a Certified Internal Auditor (CIA).

Jillian has been an active member of The Institute of Internal Auditors (IIA) Philadelphia Chapter since 2016. Her chapter activities have included NextGen Committee Co-Chair, Drexel/IIA Fraud and Internal Controls Case Competition Coach, Audit Awareness Competition Committee, 2022 Spring Conference Co-Chair, and 2017 Spring Conference panelist (Thoughts from Millennial Internal Auditors).

In addition to being an active member of the IIA, Jillian is a member of the Association of Healthcare Internal Auditors (AHIA). She has a

passion for volunteering with children within her community. Some of her volunteer activities have included Block Kids, Achieve Now/Philadelphia Reads, Playworks, and PwC Earn Your Future.



New Officer Spotlight *Lindsay Bell*



Lindsay Bell has been an active member with the Philadelphia IIA since 2010. She has served on many Fall and Spring Conference committees helping with Sponsorship, the

CAE Track and Co-Conference Chair of the 2019 Spring Summit. In 2019, Lindsay joined the Board of Governors and was most recently elected as Third Vice President over Membership. Lindsay also has been an active member of the Academic relations committee helping to navigate student involvement and interaction through the Covid Pandemic. As the Third Vice President, Lindsay hopes to engage more with current members, especially NextGen members to make sure our chapter is meeting their needs by creating meaningful and impactful experiences.

Lindsay has been at Vanguard for the past 9 years and currently is the Senior Manager leading the Retail Control Assurance team that is responsible for maintaining and testing key controls for the Retail Division and coordinating with external auditors for any engagement that impacts the Division. Prior to that role, Lindsay was the SOX Testing Manager where she led a team that performed the testing of controls over financial reporting,

she also spent time as a Senior and Staff auditor for the Financial Advisor Services and Retail businesses. Before Vanguard, Lindsay started her career at Ernst & Young in their Advisory Services group serving as internal audit functions for various public companies. She holds a Bachelor of Science degree in Accounting from Penn State University and is a Certified Public Accountant (CPA).

Being a part of the Institute of Internal Auditors community has been very impactful on Lindsay's career. She's been able to network across other auditors in the Philadelphia area and learn so much about the auditing profession to bring back to her teams at Vanguard. Through her time on the Board, she's really appreciated the care and dedication that the Board has to continue to add to the organization and provide value to profession through the challenges of the past 2 years. The ability to shift to virtual options to continue to network and learn across the industry has been impressive. However, she is excited that the external environment is safe enough to continue in person events and connections.

Her focus on the Academic Relations committee and working the Drexel Case Competition has been one of the most rewarding and fun things that Lindsay has gotten to be a part of. Over the past few years, she has been impressed with the caliber of students that have shown an interest in the internal auditing profession. Their thought process and skill sets that they have been able to demonstrate through presenting at the Case Competition makes her hopeful for the next generation of auditors and the future of the profession. She hopes that she can continue to have an impact of educating students on the possibilities and opportunities that exist in internal audit based on beneficial the experience has been for her career. She encourages any members or are interested in

getting more involved with the IIA or Academic relations to connect with her to share more about her experience.

Outside of work, Lindsay enjoys spending time with her two daughters, Elizabeth (5) and Caroline (2) and her husband, Marshall. She recently took up the role of coaching her daughter's softball team, which has been the highlight of her Spring. Her favorite place to go is Long Beach Island, NJ where her family has vacationed since she was a child.

Chapter Achievement Program (CAP) Report



The CAP program is designed to reward and recognize chapters who go above and beyond in serving their members. All CAP activities are derived from the North American Strategic Plan. Chapter status levels recognized by the program are progressive. The chapter must fulfill all Bronze requirements to achieve Bronze status, all Bronze and Silver requirements to achieve Silver status, and all Bronze, Silver and Gold requirements to achieve Gold status. Based on the dedicated service of our leadership and our members, the Philadelphia Chapter has achieved a Platinum (Gold designation for 10 of 11 years) performance status since 2013! Our Chapter will be designated as Ruby level for the 2022-2023 year if it achieves Gold status this Chapter year.

CAP activities the Chapter must complete on an annual basis are broken up into the following categories:

- IIA HQ Partnership
- Programming
- Certifications
- Advocacy

- Membership

*Chapters earn:

- Platinum by achieving Gold 10 out of 11 consecutive years;
- Ruby by achieving Platinum for 10 consecutive years;
- Sapphire by achieving Platinum for 15 consecutive years; and
- Diamond by achieving Platinum for 25 consecutive years .

Based on the dedicated service of our leadership and our members, the Philadelphia Chapter has achieved a Platinum performance level since 2013!

All Chapter members can play a role in the Chapter's success. By informing the Secretary when you participate in various activities specific to the "Service to Profession" category, this will help to increase our CAP point submission. The various activities include areas such as:

- Advocacy: Participation by any chapter member in a Junior Achievement Program/Event;
- Advocacy: Host an Internal Audit event at work, (i.e. Lunch and Learn);
- Advocacy: Schedule meeting with legislator or local politician to discuss IIA, legislation etc.
- Audit Executive Center (AEC): Contribute thought leadership to the AEC Knowledge Center;
- Certification: Participate in writing examination questions for the following IIA certifications: Certified Internal Auditor (CIA), Certified Financial Services Auditor (CFSA), Certification in Risk Management

Assurance (CRMA), Certified Government Auditing Professional (CGAP), and Certification in Control Self-Assessment (CCSA);

- Editorial: Submit articles to the Internal Auditor magazine;
- Editorial: Have articles published in the Internal Auditor magazine;
- Editorial: Have articles published in other professional journals;
- Speakers: Speaking engagements by chapter members both in and outside of the US, Canada, and the Caribbean. The chapter is eligible for CAP points if speaker is not compensated. Additionally, presentations can be outside of the Internal Audit profession.
- Volunteerism: The Chapter will receive points based upon the percentage of volunteer growth annually.

If you have participated or plan to participate in any of the activities described above, during the period of June 1, 2021 through May 31, 2022 please communicate this information to the Chapter Secretary, Maeve Raak (secretary@phillyiia.org) and provide a brief description of the activity/event. If the activity is related to a speaking engagement please provide the date of the presentation, a brief description of the event/presentation, and the length of time you presented.

We appreciate your participation in helping the Chapter to once again achieve a Platinum status for this Chapter Year!

Some Lighthearted Internal Audit Humor

Courtesy of CareersinAudit.com—www.careersinaudit.com

CareersinAudit.com
cia



No, a tweet made up entirely of emojis is not sufficient documentary evidence!

The Current Institute of Internal Auditors Philadelphia Chapter Board of Governors (2022-2023)

Ex-Officio – Two Past Presidents

Laurie Riggs
Ryan Egan

Officers

Matt Skala
Sean McErlean
Jillian Zerillo
Lindsay Bell
Frank Macciocca
Maeve Raak

Term Expiring 2023

Peter Parillo
Ryan Calef
Susan Allem
Monica DeBellis

Term Expiring 2024

Ken Brzozowski
Adam Ross
Bernadette Robinson
Sandra Mozee-Smith

Term Expiring 2025

Mary Lyman
Jamal Ahmed

Non-Voting Board Member

Michael Levy (NA and Global IIA Board Member)

Growing Awareness of Internal Audit

May Is International Internal Audit Awareness Month!

As an internal audit professional, you play an important role in raising awareness and elevating the profession. May offers you an important opportunity to promote the profession among your stakeholders.

Though it's important to promote the value of internal audit year-round, The IIA especially encourages this championing in the month of May.

Our Building Awareness Toolkit is the perfect complement to your celebration of International Internal Audit Awareness Month by offering creative ideas and tips, sample programs, videos, tools, and templates all designed around generating greater awareness of the important work that you do. Start showcasing internal audit to customers, executive management, the board, and anyone else who may be interested by downloading the toolkit below.

For example, you can customize your email signature and social media accounts with the International Internal Audit Awareness Month digital icon (depicted at right). You can hold a lunch-and-learn in your workplace to dispel myths about internal auditing and explain the value that a well-resourced, independent internal audit function can provide. You can also raise the profile of your internal audit department's staff members by featuring their biographies in an article for your company's intranet or internal newsletter.

Don't let the opportunity pass to advocate the importance of internal auditing to your coworkers and other stakeholders. For additional ideas, sample programs, tips, and templates, download the free Building Awareness Toolkit from The IIA's website.



Chapter Feedback

If you have any questions, suggestions, comments, or concerns please don't hesitate to reach out to communications@phillyiia.org.

Freedom Pass Bundles

Save up to 30% at our events!

Bundle Size	Cost	Cost per CPE*	Savings
40 CPE Credits	\$1,485	\$37.13	10%
80 CPE Credits	\$2,805	\$35.06	15%
160 CPE Credits	\$5,280	\$33.00	20%
320 CPE Credits	\$9,900	\$30.94	25%
640 CPE Credits	\$18,480	\$28.88	30%



The Institute of
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Philadelphia

Conditions for purchase:

- Credits Expire after 18 months
- Must be a member of the Philly Chapter of the IIA
- * Regular member cost approximately \$41.25 per CPE

For further details, please reach out to programs@phillyiia.org

Fine Print

- Freedom Pass credits generally translate to CPE hours for each event, unless otherwise stated (i.e., 5 people attending an 8 CPE seminar is 40 Freedom Pass Credits);
- Freedom pass credits expire 18 months from date of purchase;
- Every Quarter, a statement providing the balance of used and purchased Freedom Pass credits will be provided to each account holder;
- Freedom Pass bundles must be purchased by a member of the Philadelphia Chapter of the IIA; and
- Most programs offered by the Philadelphia Chapter of the IIA are eligible to be purchased using Freedom Pass credits.

SAVE 20% on CIA Exam Prep in May



LEARN MORE

**THE IIA's
CIA**
LEARNING SYSTEM

***[For further information please go visit:
https://www.learnCIA.com/save20/](https://www.learnCIA.com/save20/)***