

A Guide to the Records of the Virginia Secretary of Finance, 2017-2022 (bulk 2018-2021)

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A Collection in the Library of Virginia 53509

Library of Virginia

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History

Processed by: Maria Shellman

Title Statement

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English

Creator

Virginia Secretary of Finance

Extent

7.7 cu. ft (22 boxes)

Repository

The Library of Virginia

Administrative Information

Access Restrictions

Privacy protected and confidential information is restricted from public access for 75 years per Code of Virginia 42.1-78. Restricted documents have been sealed within the collection. Types of records restricted include, but are not limited to: state income tax returns and workers' compensation reports.

Use Restrictions

There are no restrictions.

Acquisition Information

Transferred on 7 January 2022 by the Virginia Office of the Secretary of Finance, 1111 East Broad Street, Richmond, VA 23219.

Preferred Citation

Records of the Virginia Secretary of Finance, 2017-2022 (bulk 2018-2021). Accession 53509, State government records services, The Library of Virginia, Richmond, Va.

Historical Information

In 1970, the Governor's Management Commission Study recommended the creation of six "Deputy Governors" assist the Chief Executive in his managerial duties, compatible functions of government were grouped under these administrative heads, who would serve as the Governors top management team or "secretariats," as they are called now. The General Assembly in 1972 created six Secretariats positions initially. As government reorganized, that number fluctuated when government agencies expanded or consolidated.

Since the establishment of a secretarial system in 1972, there have been several reorganizations of that system. The financial management function of the state has shifted from under the direction of the Secretary of Finance to the Secretary of Administration; then to Secretary of Administration and Finance and currently back to the Secretary of Finance, through various reorganizations of state government from 1970's to the present. The function of the secretary is to provide sound fiscal management and recommend to the Governor a comprehensive budget for those agencies under his jurisdiction. The secretary's responsibilities are: to monitor programs, services and performance of subordinate state agencies to develop state policies programs for long-range planning and policy formulation; and approve solicitation or acceptance of any donations, gifts or grants; to hold agency heads accountable for their agency's administrative, fiscal and program performance. All secretaries are appointed by the governor and serve at his will.

During the administration of Governor Ralph Northam (2018-2022), the Secretary of Finance was responsible for the direction or jurisdiction over the following agencies and boards: Dept. of Accounts, Dept. of Planning and Budget; Dept. of Taxation, Department of the Treasury, the Virginia Resources Authority, and the Virginia Board of Accountancy.

Governor Ralph Northam appointed former Secretary of Transportation Aubrey Layne Jr. to serve as Secretary of Finance. Upon Layne's resignation in June 2021, Governor Northam appointed Joe Flores as secretary. Flores served until the end of Governor Northam's Administration in 2022.

Scope and Content

Records, 2017-2022, of Secretary of Finance Aubrey Layne Jr. and Secretary of Finance Joe Flores during the administration of Governor Ralph Northam. The collection is housed in 22 boxes and includes budget and financial presentations, decision briefs, revenue reports, correspondence, and Secretary of Finance department subject files. Information on the COVID-19 pandemic; Coronavirus Aid, Relief, and Economic Security (CARES) Act funds; American Rescue Plan Act (ARPA) funds; and other coronavirus relief funds can be found throughout the collection.

Arrangement

This collection is arranged into the following series:

- Series I. Joint Money Committee Files, 2018-2021;
- Series II. Decision Briefs, 2017-2022;
- Series III. Revenue Reports, 2018-2021;
- Series IV. Correspondence and Subject Files, circa 2018-2022.

Contents List

Series I. Joint Money Committee Files, 2018-2021.

Extent

Extent: 0.35 cu. ft (1 box).

Scope and Content

Series I: Joint Money Committee Files, created and maintained by Secretary of Finance Aubrey Layne Jr. and

Secretary of Finance Joe Flores, during the administration of Governor Ralph Northam. This series contains presentations to the Joint Money Committee and their cited reports. Topics include state budget, revenue reports, tax impact assessments, and fiscal trends and forecasts. Only the electronic file is available for the December 2021 Joint Money Committee presentation.

Arrangement

Arranged chronologically.

Review of General Fund Revenues and the Virginia Economy for Fiscal Year 2018; A presentation to the Senate Finance, House Appropriations and House Finance Committees, 2018 Aug 17.

Box 1

Folder 1

Governor Northam's Proposed Amendments to the 2018-2020 Budget; Economic Outlook and Revenue Forecast: A briefing for the Senate Finance, House Appropriations and House Finance Committees, 2018 Dec 18.

Box 1

Folder 2

Review of General Fund Revenues and the Virginia Economy for Fiscal Year 2019; A presentation to the Senate Finance, House Appropriations and House Finance Committees (1 of 2), 2019 Aug 20.

Box 1

Folder 3

Review of General Fund Revenues and the Virginia Economy for Fiscal Year 2019; A presentation to the Senate Finance, House Appropriations and House Finance Committees (2 of 2), 2019 Aug 20.

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Folder 4

Governor Northam's Proposed 2020-2022 Budget; Economic Outlook and Revenue Forecast: A Briefing for the Senate Finance, House Appropriations and House Finance Committees, 2019 Dec 17.

Box 1

Folder 5

Review of General Fund Revenues and the Virginia Economy for Fiscal Year 2020; Interim Economic Outlook and Revenue Forecast for Fiscal Years 2021 and 2022: A presentation to the House Appropriations, House Finance and Senate Finance and Appropriations Committees, 2020 Aug 18.

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Folder 6

Governor Northam's Proposed Amendments 2020-2022 Budget; Economic Outlook and Revenue Forecast: A briefing for the Senate Finance and Appropriations, House Appropriations, and House Finance Committees, 2020 Dec 16.

Box 1

Folder 7

Review of General Fund Revenues and the Virginia Economy for Fiscal Year 2020; A presentation to the Senate Finance and Appropriations, House Appropriations, and House Finance Committees, 2021 Aug 18.

Box 1

Folder 8

Series II. Decision Briefs, 2017-2022.

Extent

Extent: 5.6 cu. ft (16 boxes).

Scope and Content

Series II: Decision Briefs, created and maintained by Secretary of Finance Aubrey Layne Jr. and Secretary of Finance Joe Flores, during the administration of Governor Ralph Northam. This series contains decision briefs and Secretary of Finance recommendations regarding state finances, including agency requests, coronavirus relief funds, transportation projects, environmental conservation, education programs, and economic development, among others.

Arrangement

Arranged chronologically by month.

Decision Briefs, 2017 Aug.

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Decision Briefs, 2017 Nov.

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Folder 2

Decision Briefs, 2017 Dec.

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Folder 3

Decision Briefs, 2018 Jan.

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Folder 4

Decision Briefs, 2018 Feb.

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Folder 5

Decision Briefs, 2018 Mar.

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Folder 6

Decision Briefs, 2018 Apr.

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Folder 7

Decision Briefs, 2018 Apr.

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Folder 8

Decision Briefs, 2018 Apr.

Box 3

Folder 1

Decision Briefs, 2018 May.

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Folder 2

Decision Briefs, 2018 May.

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Folder 3

Decision Briefs, 2018 Jun.

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Decision Briefs, 2018 Jun.

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Decision Briefs, 2018 Jun.

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Decision Briefs, 2018 Jul.

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Decision Briefs, 2018 Jul.

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Folder 1

Decision Briefs, 2018 Jul.

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Decision Briefs, 2018 Aug.

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Decision Briefs, 2018 Sep.

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Decision Briefs, 2018 Oct.

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Decision Briefs, 2018 Oct.

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Decision Briefs, 2018 Oct.

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Folder 1

Decision Briefs, 2018 Nov.

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Decision Briefs, 2018 Nov.

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Decision Briefs, 2018 Nov.

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Folder 4

Decision Briefs, 2018 Dec.

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Folder 5

Decision Briefs, 2018 Dec.

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Folder 6

Decision Briefs, 2018 Dec.

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Folder 7

Decision Briefs, 2019 Jan.

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Folder 8

Decision Briefs, 2019 Jan.

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Folder 1

Decision Briefs, 2019 Feb.

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Folder 2

Decision Briefs, 2019 Feb.

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Folder 3

Decision Briefs, 2019 Mar.

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Folder 4

Decision Briefs, 2019 Mar.

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Decision Briefs, 2019 Apr.

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Decision Briefs, 2019 Apr.

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Folder 7

Decision Briefs, 2019 Apr.

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Folder 8

Decision Briefs, 2019 May.

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Folder 1

Decision Briefs, 2019 May.

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Folder 2

Decision Briefs, 2019 Jun.

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Folder 3

Decision Briefs, 2019 Jun.

Box 7

Folder 4

Decision Briefs, 2019 Jun.

Box 7

Folder 5

Decision Briefs, 2019 Jul.

Box 7

Folder 6

Decision Briefs, 2019 Jul.

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Folder 7

Decision Briefs, 2019 Aug.

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Folder 8

Decision Briefs, 2019 Aug.

Box 8

Folder 1

Decision Briefs, 2019 Sep.

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Folder 2

Decision Briefs, 2019 Sep.

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Folder 3

Decision Briefs, 2019 Oct.

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Folder 4

Decision Briefs, 2019 Oct.

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Folder 5

Decision Briefs, 2019 Nov.

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Folder 6

Decision Briefs, 2019 Dec.

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Folder 7

Decision Briefs, 2020 Jan.

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Folder 1

Decision Briefs, 2020 Jan.

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Folder 2

Decision Briefs, 2020 Jan.

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Folder 3

Decision Briefs, 2020 Feb.

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Folder 4

Decision Briefs, 2020 Feb.

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Folder 5

Decision Briefs, 2020 Mar.

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Folder 6

Decision Briefs, 2020 Mar.

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Folder 7

Decision Briefs, 2020 Apr.

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Folder 8

Decision Briefs, 2020 Apr.

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Folder 9

Decision Briefs, 2020 Apr.

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Decision Briefs, 2020 May.

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Decision Briefs, 2020 May.

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Decision Briefs, 2020 Jun.

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Decision Briefs, 2020 Jun.

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Folder 3

Decision Briefs, 2020 Jun.

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Folder 4

Decision Briefs, 2020 Jun.

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Folder 5

Decision Briefs, 2020 Jul.

Box 10

Folder 6

Decision Briefs, 2020 Aug.

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Folder 7

Decision Briefs, 2020 Aug.

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Folder 1

Decision Briefs, 2020 Sep.

Box 11

Folder 2

Decision Briefs, 2020 Sep.

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Folder 3

Decision Briefs, 2020 Sep.

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Folder 4

Decision Briefs, 2020 Oct.

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Folder 5

Decision Briefs, 2020 Oct.

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Folder 1

Decision Briefs, 2020 Oct.

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Decision Briefs, 2020 Oct.

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Folder 3

Decision Briefs, 2020 Oct.

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Folder 4

Decision Briefs, 2020 Nov.

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Folder 5

Decision Briefs, 2020 Nov.

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Folder 6

Decision Briefs, 2020 Nov.

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Folder 1

Decision Briefs, 2020 Dec.

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Folder 2

Decision Briefs, 2020 Dec.

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Folder 3

Decision Briefs, 2020 Dec.

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Folder 4

Decision Briefs, 2020 Dec.

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Folder 5

Decision Briefs, 2021 Jan.

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Folder 6

Decision Briefs, 2021 Jan.

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Folder 7

Decision Briefs, 2021 Feb.

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Folder 1

Decision Briefs, 2021 Feb.

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Folder 2

Decision Briefs, 2021 Feb.

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Folder 3

Decision Briefs, 2021 Mar.

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Decision Briefs, 2021 Mar.

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Decision Briefs, 2021 Mar.

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Folder 6

Decision Briefs, 2021 Apr.

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Decision Briefs, 2021 Apr.

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Folder 1

Decision Briefs, 2021 Apr.

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Folder 2

Decision Briefs, 2021 May.

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Folder 3

Decision Briefs, 2021 May.

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Folder 4

Decision Briefs, 2021 May.

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Folder 5

Decision Briefs, 2021 Jun.

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Decision Briefs, 2021 Jun.

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Folder 7

Decision Briefs, 2021 Jun.

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Folder 8

Decision Briefs, 2021 Jul.

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Folder 1

Decision Briefs, 2021 Aug.

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Folder 2

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Decision Briefs, 2021 Sep.

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Decision Briefs, 2021 Sep.

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Decision Briefs, 2021 Sep.

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Folder 6

Decision Briefs, 2021 Oct.

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Decision Briefs, 2021 Oct.

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Folder 1

Decision Briefs, 2021 Nov.

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Decision Briefs, 2021 Nov.

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Decision Briefs, 2021 Dec.

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Folder 4

Decision Briefs, 2021 Dec.

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Decision Briefs, 2021 Dec.

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Decision Briefs, 2021 Jan.

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Folder 7

Series III. Revenue Reports, 2018-2021.

Extent

Extent: 1.05 cu. ft (3 boxes).

Scope and Content

Series III: Revenue Reports, created and maintained by Secretary of Finance Aubrey Layne Jr. and Secretary of Finance Joe Flores, during the administration of Governor Ralph Northam. This series contains economic and revenue update briefing presentations and reports including information and charts on tax collection, economic indicators, revenue analysis, general fund changes, and economic forecasts.

Arrangement

Arranged chronologically.

Economic and Revenue Update: A Briefing for the Money Committees, 2018 Jan.

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Economic and Revenue Update: A Briefing for the Money Committees, 2018 Feb.

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Folder 2

Economic and Revenue Update: A Briefing for Richmond Times-Dispatch, 2018 Mar.

Box 18

Folder 3

Economic and Revenue Update: A Briefing for the Money Committees, 2018 Apr.

Box 18

Folder 4

Economic and Revenue Update: A Briefing for the Money Committees (1 of 2), 2018 May.

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Folder 5

Economic and Revenue Update: A Briefing for the Money Committees (2 of 2), 2018 May.

Box 18

Folder 6

**Economic and Revenue Update: A Briefing for the Money Committees,
2018 Sep.**

Box 18

Folder 7

**Economic and Revenue Update: A Briefing for the Money Committees,
2018 Oct.**

Box 18

Folder 8

**Economic and Revenue Update: A Briefing for the Money Committees,
2018 Nov.**

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Folder 1

**Economic and Revenue Update: A Briefing for the Money Committees (1 of
2), 2019 Jan.**

Box 19

Folder 2

**Economic and Revenue Update: A Briefing for the Money Committees (2 of
2), 2019 Jan.**

Box 19

Folder 3

**Economic and Revenue Update: A Briefing for the Money Committees,
2019 Feb.**

Box 19

Folder 4

**Economic and Revenue Update: A Briefing for the Money Committees,
2019 May.**

Box 19

Folder 5

**Economic and Revenue Update: A Briefing for the Money Committees,
2019 Jun.**

Box 19

Folder 6

**Economic and Revenue Update: A Briefing for the Money Committees,
2019 Sep.**

Box 19

Folder 7

**Economic and Revenue Update: A Briefing for the Money Committees,
2019 Oct.**

Box 19

Folder 8

**Economic and Revenue Update: A Briefing for the Money Committees,
2020 Jan.**

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Folder 9

Economic and Revenue Update: A Briefing for the Money Committees, 2020 Feb.

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Economic and Revenue Update: A Briefing for the Money Committees, 2020 May.

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Folder 1

Economic and Revenue Update: A Briefing for the Money Committees, 2020 Jun.

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Folder 2

Economic and Revenue Update: A Briefing for the Money Committees, 2020 Sep.

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Folder 3

Economic and Revenue Update: A Briefing for the Money Committees, 2020 Oct.

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Folder 4

Economic and Revenue Update: A Briefing for the Money Committees (1 of 2), 2021 Jan.

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Folder 5

Economic and Revenue Update: A Briefing for the Money Committees (2 of 2), 2021 Jan.

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Folder 6

Economic and Revenue Update: A Briefing for the Money Committees (1 of 2), 2021 Feb.

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Folder 7

Economic and Revenue Update: A Briefing for the Money Committees (2 of 2), 2021 Feb.

Box 20

Folder 8

Economic and Revenue Update: A Briefing for the Hampton Roads Tax Forum, 2021 May 19.

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Folder 9

Economic and Revenue Update: A Briefing for the Money Committees, 2021 Jun.

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Folder 10

Economic and Revenue Update: A Briefing for the Money Committees, 2021 Sep.

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Folder 11

Economic and Revenue Update: A Briefing for the Money Committees, 2021 Oct.

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Folder 12

Series IV. Correspondence and Subject Files, circa 2018-2021.

Extent

Extent: 0.7 cu. ft (2 boxes).

Scope and Content

Series IV: Correspondence and Subject Files, created and maintained by Secretary of Finance Aubrey Layne Jr. and Secretary of Finance Joe Flores, during the administration of Governor Ralph Northam. This series contains department subject files, correspondence, financial statements, and meeting notes. The department subject files contain reports, memorandums, and requests from the departments and boards overseen by the Secretary of Finance. Correspondence includes constituent correspondence on subjects such as tax and state budget concerns, outgoing correspondence relating to state financial actions, and thank you notes.

Arrangement

Arranged by its original order.

Department of Taxation (TAX) (1 of 3), 2018-2022.

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Department of Taxation (TAX) (2 of 3), 2018-2022.

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Folder 2

Department of Taxation (TAX) (3 of 3), 2018-2022.

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Folder 3

Department of Planning and Budget (DPB), 2018-2022.

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Folder 4

Department of Accounts (DOA), 2018-2022.

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Folder 5

Department of Treasury (TRS), 2020-2021.

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Folder 6

Virginia Resources Authority (VRA), 2020.

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Folder 7

Boards, circa 2018-2022.

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Folder 8

Secretary of Finance Financial Statements (1 of 3), 2018-2021.

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Folder 9

Secretary of Finance Financial Statements (2 of 3), 2018-2021.

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Secretary of Finance Financial Statements (3 of 3), 2018-2021.

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Virginia Board of Accountancy (VBOA), 2019-2021.

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Folder 12

Letters (1 of 4), 2018-2021.

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Folder 13

Letters (2 of 4), 2018-2021.

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Folder 14

Letters (3 of 4), 2018-2021.

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Folder 1

Letters (4 of 4), 2018-2021.

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Folder 2

Correspondence to Aubrey Layne (1 of 7), circa 2018-2022.

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Folder 3

Correspondence to Aubrey Layne (2 of 7), circa 2018-2022.

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Folder 4

Correspondence to Aubrey Layne (3 of 7), circa 2018-2022.

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Folder 5

Correspondence to Aubrey Layne (4 of 7), circa 2018-2022.

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Folder 6

Correspondence to Aubrey Layne (5 of 7), circa 2018-2022.

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Folder 7

Correspondence to Aubrey Layne (6 of 7), circa 2018-2022.

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Correspondence to Aubrey Layne (7 of 7), circa 2018-2022.

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Folder 9

Correspondence from Joe Flores, 2021.

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Joe Flores notes (1 of 2), circa 2018.

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Folder 11

Joe Flores notes (2 of 2), circa 2018.

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Folder 12