

IMA NorthEast Regional Council



4th Annual Fall Conference

September 19-20, 2011

Sturbridge, Massachusetts

**REGISTER
EARLY AND
SAVE**

18 CPE's

**Mark Your
Calendar and
Plan to Attend**

Education and CMA Exam Prep Tracks - Check it out!



The Association for
Accountants and
Financial Professionals
in Business

NorthEast Regional Council

Linda M. Simmons

42 Farm Brook Court

Hamden, CT 06514

Career Development



The Association for
Accountants and
Financial Professionals
in Business

18 CPE'S

CAREER DEVELOPMENT



NETWORKING

OPERATIONS

TECHNOLOGY

MOTIVATION

BEST PRACTICES

JOIN US!!!!

Conference At a Glance

CMA Exam Prep Sessions

Concurrent Track - Both days

See General Education Sessions for Breakfast, Lunch and Breaks

Monday - September 19, 2011

♦ 9:00 AM-12:00 PM

"Financial Ratios & Spreadsheet Tools Used on the CMA Exam"

Speaker: Len Long

3.0 CPE

♦ 1:30 PM-5:15 PM

"Ethics—Part 1 of the CMA Exam"

Speaker: Tony Kvedar

4.0 CPE

Tuesday - September 20, 2011

♦ 8:15 AM-11:15 AM

"Time Value of Money and Calculator Use on the CMA Exam"

Note: A TI BA II Plus calculator is required for this session

Speaker: Len Long

3.0 CPE

♦ 1:15 PM-4:00 PM

"Essay Writing for the CMA Exam"

Speaker: Tony Kvedar

3.0 CPE



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Conference At a Glance

General Education Sessions

Sunday - September 18, 2011

- ◆ 6:00 -7:30 PM REGISTRATION
- ◆ 6:30 -7:30 PM COUNCIL MEETING

Monday - September 19, 2011

- ◆ 7:00-7:45 AM BREAKFAST/REGISTRATION
- ◆ 7:45-9:00 AM *"The Relationship Factor"* 1.5 CPE
Speaker: Bob Carnegie
- ◆ 9:00-10:15 AM *"Macros and Excel—Part 1"* 1.5 CPE
Speaker: Bill Riendeau
- ◆ 10:15-10:45 AM BREAK
- ◆ 10:45-12:00 PM *"Macros and Excel—Part 2"* 1.5 CPE
Speaker: Bill Riendeau
- ◆ 12:00-1:00 PM LUNCH-CPE session
- ◆ *"Grow & Protect Your Wealth"* 1.0 CPE
Speaker: James Timilty
- ◆ 1:00-1:30 PM BREAK
- ◆ 1:30-3:15 PM *"Managing, Motivating and Integrating Your Multigenerational Workforce"* 2.0 CPE
Speaker: Dianne Durkin
- ◆ 3:15-3:30 PM BREAK
- ◆ 3:30-5:15 PM *"LEAN-Lessons Learned"* 2.0 CPE
Speaker: Paul Cestari
- DINNER ON YOUR OWN
- ◆ 7:30-10:00 PM *"Hospitality Social"*



Tuesday - September 20, 2011



- ◆ 7:00-8:15 AM BREAKFAST-CPE session
"Disgruntled Employees—Their Problem, Your Problem"
Speaker: Hamish Blackman 1.5 CPE
- ◆ 8:15-9:30 AM *"Will Your Next Software Selection Bankrupt Your Company?"*
Speakers: Anthony Sansone & Daniel Gingras 1.5 CPE
- ◆ 9:30-10:00 AM BREAK
- ◆ 10:00-11:15 AM *"Revival in an Old Industry"*
Speaker: Mark Bonney 1.5 CPE
- ◆ 11:15-1:00 PM LUNCH-CPE session
"Using the 5 Secrets of Human Behavior to Communicate With Anyone"
Speaker: Beverly Flaxington 1.0 CPE
- ◆ 1:00-1:15 PM BREAK
- ◆ 1:15-2:30 PM *"Handheld Technology - What's the Threat?"*
Speaker: Eric Peterson 1.5 CPE
- ◆ 2:30-2:45 PM BREAK
- ◆ 2:45-4:00 PM *"Freight - The Forgotten Budget Line"*
Speaker: Aaron Miller 1.5 CPE

Please visit our website at <http://www.nerc.imanet.org> for more detail on the sessions and other conference updates.

Speakers

Hamish Blackman

Mr. Blackman is the Principal of Breakthrough Collaboration, Inc. Hamish graduated from Middlebury College and received his Master's Degree from Lesley University. A trained mediator, Hamish consults with organizations on factors impacting productivity and morale, and works with groups to resolve conflicts. He has extensive experience providing training and related activities to organizations in the public, private and non-profit sectors. He has worked with departments and programs at 22 Colleges and Universities. A sought-after speaker, Hamish has presented keynotes at National and Regional conferences throughout the United States, Breakthrough Collaboration, Inc. is a comprehensive organization change and development firm that partners with clients to create transformative workplaces and work lives.

Mark J. Bonney

Mark J. Bonney joined Direct Brands Inc., a leading direct marketing company headquartered in New York City, as Executive Vice President and CFO in March 2010. Direct Brands is yet another turnaround for Mr. Bonney. In 2008 he received the CFO Of The Year Award for Best Turnaround Manager. Until March 2002, he spent 27 years in industry in senior financial and operating roles at publicly traded companies. Mr. Bonney has been involved in the turnaround of three public companies and is currently Chairman of the Board of Directors of the Community Healthy Center, Inc. a \$70 millions full service not-for-profit health center in CT.

Bob Carnegie

Bob Carnegie has been an active practitioner in the field of Human Resources for over 30 years. His corporate background includes executive positions in human resources and operations management where he was instrumental in creating and implementing innovative programs to improve individual and corporate performance and productivity. He also conducts operational audits of HR functions in all types of organizations to improve efficiency and assure program results. For over 25 years Bob was a faculty member of the Graduate School, USDA, Government Audit Training Institute, in Washington DC. His consulting and training and assignment have included numerous federal, state, and local government agencies. His workshops have taken him all across the US and to Latin America, Africa and Europe. Since 1996, Bob has delivered several programs for the United Nations in New York, Nairobi, Kenya, Vienna, Austria and Geneva. Bob holds a Bachelor of Arts degree Sociology and a Master of Business Administration degree. He has been a member of the Boston Chapter of the Association of Government Accountants since 1997 and has been a presenter at several AGA National Conferences as well as regional chapter training events and conferences.

Paul D. Cestari, CPA

Paul D. Cestari, CPA, is currently Vice President, Finance at Barnes Precision Components, headquartered in Farmington, Connecticut. Precision Components has 20 manufacturing units worldwide, and is a division of Barnes Group Inc. (NYSE: 'B'). Paul and his Finance team are actively engaged in supporting the BA's globalization and lean initiatives. Previously, Paul was the Corporate Director of Internal Audit, where he played a lead role in designing and implementing the company's worldwide SOX 404 program. Other prior experience includes controllership and cash management positions at Barnes, along with audit experience at Ernst & Young. Paul has a Bachelor of Science degree in Economics from Trinity College in Hartford, Connecticut and a Masters in Accounting from the University of Hartford.

Dianne Durkin

Dianne Durkin is the president and founder of Loyalty Factor, a consulting and training company that enhances employee, customer and brand loyalty for some of the nation's most prominent corporations in America and many smaller businesses. She is also author of "The Loyalty Factor: Building Employee, Customer and Brand Loyalty," as well as the upcoming 2011 release, "Magnetic Leadership: It's Time to Get R.E.A.L." With more than 25 years of experience in training and development, finance, direct sales and international marketing, Durkin is continually sought after to lead companies into new markets and directions, handle organizational restructures, and set up programs that will build lasting commitments with employees and customers. Dianne has been interviewed by National Public Radio and Bloomberg Television & Radio. She has been featured in the New York Times, Wall Street Journal, Fortune, USA Today, Investor's Business Daily, the Boston Globe, among numerous other publications, and was the subject of a cover story in Learning and Training Magazine. A graduate of Rivier College, Durkin holds a Master's Degree from Duquesne University and has completed advanced programs at University of Santa Clara and Babson College.

Beverly Flaxington

Beverly is an accomplished business consultant, personal and career coach, author, college professor, corporate trainer, facilitator, behavioral expert, entrepreneur and business development expert. She has over 25 years of experience in corporate, interim management and consulting roles helping firms reach higher levels of sales and marketing effectiveness. She is a frequent speaker and contributor to articles on the subjects of sales, marketing, behavioral issues, employee and career issues, effective time management and dealing with difficult people. Beverly's book, *Understanding Other People: The Five Secrets to Human Behavior*, received the gold award from Readers Favorite. She also authored *The 7 Steps to Effective Business Building for Financial Advisors: How top earning advisors attract and retain the most profitable clients*, published by ATA Press. Beverly holds both a BSBA and an MBA from Suffolk University. Beverly co-founded The Collaborative in 1995, a sales and marketing consultancy and is currently Principal of the firm. She is also co-founder of AdvisorsTrustedAdvisor.com (ATA) a business dedicated to independent investment advisors. She is also a professor at Suffolk University as well as a Certified Professional Behavioral Analyst (CPBA) and Certified Professional Values Analyst (CPVA).



Speakers

Daniel Gingras

Gingras is a Partner in the New England practice of Tatum, LLC. He has 25 years of experience as a senior executive with extensive qualifications in all facets of project life cycle, from initial feasibility analysis and conceptual design through documentation, implementation, user training and enhancement. He has extensive operating experience including roles as CEO, COO and CIO of numerous public and private companies. Gingras is a certified Project Management Professional (PMP) and a Certified Computer Professional (CCP) and holds a Master of Science in Computer Science from Boston University.

Anthony J. Kvedar, Jr., CMA, CPA

Tony holds a BS in Business Administration and a MBA from the University of Vermont. He received his CMA in 1994, CPA in the state of Vermont in 1996 and Certified Rate of Return Analysis in 2004. Tony has 26 years experience in the regulated utility field in accounting, financial planning and rate making and works for Green Mountain Power Corporation. Tony is an adjunct instructor in Accounting at the University of Vermont and has also been an adjunct instructor in accounting, finance, and income tax at Trinity College. He has served on the board of several accounting organizations including the Vermont Society for Accountants in Industry, the Institute of Management Accountants on the regional and national level and is currently the president of the local IMA Green Mountain chapter. In addition to accounting organizations, Tony is also the Treasurer of the Vermont Symphony Orchestra and Past President of the Rotary Club of South Burlington VT.

Leonard T. Long, CMA, CFM

Dr. Leonard Long is a senior visiting lecturer at Bridgewater State College and the Treasurer of MIL Associates, Inc. Len holds a DBA from Nova University and an MBA from American International University as well as advanced degrees in Accounting, Finance and religion. Len's professional certifications include Certified Management Accountant, Certified Financial Manager and Certified Municipal Accountant. He is a member of the Town of Mashpee Finance Committee, the American Accounting Association and Kiwanis International. Len also has positions as a Past President and Treasurer of the IMA Boston Chapter and the CMA Program Director for the IMA NorthEast Regional Council.

Aaron Miller

Aaron Miller is currently a managing partner and VP of Operations for H Logistics LLC, based in Clinton, CT; which provides freight management and transportation services for small to medium size enterprises. As an agent for MESCA Freight Services, more than 8,000 clients derive value from resources that lower cost and improve efficiency in their logistics planning and execution. H Logistics provides services for truckload, small package, volume LTL, as well. Prior to this, Aaron was the Director of Transportation for a leading global manufacturer and supplier of automotive aftermarket products, overseeing a budget of more than \$20m annually. His experience includes transportation management for Data Switch Corp, Perkin Elmer Corp, Remington Arms Co., and in the service sector as an Operations Manager for a North American Van Lines agent and managing a local airfreight terminal for Flying Tigers. Aaron was a founding member of a local chapter of the Council of Supply Chain Management Professionals (f/k/a Council of Logistics Management). Aaron holds a Masters degree from Yale University.

Eric Peterson

Vice President and co-owner, of Star Computers LLC, an Information Technology and consulting company based in Niantic, CT. He has 15 years' experience in the information technology field, with expertise in small business systems integration and security using the latest Microsoft and PC technologies. While serving 9 years in the United States Air Force he attended the Air Force Computer Systems training program receiving Distinguished Graduate honors. After honorably separating he then went on to achieve and has maintain Microsoft Certified Professional status and continues to stay current with evolving technologies that can assist in today's businesses.

Bill Riendeau

Bill Riendeau, is the owner of WRR Enterprises, LLC. WRR specializes in the ERP System Syspro as well as working with several other ERP systems and custom programming in SQL and MS Access Databases. At WRR Enterprises, MS Office is used extensively including MS Excel and MS Access. There are several tools that can be added to the programs in order to use them more efficiently. Bill has been an owner of WRR Enterprises, LLC for 5 years before which he held positions such as Controller and Senior Financial Analyst. Bill has also been a member of the Institute of Management Accountants since 1990 when it was the NAA. He earned a Bachelor's degree in Accounting from Rhode Island College. Bill enjoys spending his free time with his 8 year old son and is a volunteer fireman with the Stratford Fire and Rescue.



Anthony Sansone

Sansone is a Partner in the New England Office of Tatum, LLC. With over 25 years of experience in engineering, manufacturing, program management, executive management, corporate shared services, and consulting. He has an extensive background in business strategy, transformation, organization and change management, sourcing, systems, and operations in the high technology, manufacturing, retail, defense and not-for-profit sectors. Sansone holds a Master of Science in Electrical Engineering from the University of Lowell and a Bachelor of Science in Electrical Engineering from Lowell Technological Institute.

James Timilty

James Timilty is a proud member of The New York Life Insurance Company out of The Boston General Office. Mr. Timilty is a Financial Services Professional and Registered Representative in the state of Massachusetts who prides himself on a thorough analysis of his client's wants and needs in order to assist them in making informed decisions concerning their financial protection and retirement goals. Mr. Timilty is a proud member of Cape Cod Canal Chamber of Commerce, BNI and the Bourne/Wareham Chapter of Kiwanis where he serves on the board of directors. He resides in Plymouth, Ma with his lovely wife Michele and his two dogs. His professional words to live by are "Care and Diligence bring luck."



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Lodging Information

Sturbridge Host Hotel & Conference Center
366 Main Street
Sturbridge, MA 01566

Tel: 508 347-7393, 800 582-3232

Fax: 508 347-3944

Email: info@sturbridgehosthotel.com

Register Early!

To reserve a room at conference rates, please call the hotel and mention **NorthEast Regional Council of the Institute of Management Accountants**. It is important to specify that group name when making a reservation.

Room Rates: \$112 for a Single or Double
 \$122 for a Triple
 \$132 for a Quad

All rates are per night plus local and state taxes.

Conference rates are in effect while rooms are available or until the cut-off date of September 5, 2011.

Call-in reservations may be cancelled up to 48 hours prior to arrival without penalty. Reservations canceled within 48 hours will be charged the first nights room rate. Please check with the hotel.

Useful Links:

Sturbridge Host Hotel	www.sturbridgehosthotel.com
Old Sturbridge Village 1/2 mile	www.osv.org
The Big E (09/16-10/02) 37 miles	www.thebige.com
Sturbridge Pottery 1 mile	www.sturbridgepottery.com

Lodging and Directions

Driving Directions

Directions to Sturbridge Host Hotel.

Sturbridge Host Hotel & Conference Center is located on Route 20 in Sturbridge, MA.

From the North, East and West:

Take the Massachusetts Turnpike (Interstate 90) to Exit 9, Route 20 West.

From the South:

Take either Interstate 84 or Route 131 to Route 20 West. Sturbridge Host Hotel & Conference Center is located on the shore of Cedar Lake, just past the first set of traffic lights

Sturbridge Massachusetts Airport & Transportation.

Sturbridge Host Hotel & Conference Center is conveniently located near Logan International Airport in Boston (62 miles), Bradley International Airport near Hartford, Connecticut (50 miles), and TF Green Airport near Providence, Rhode Island (60 miles). Worcester Regional Airport is approximately 30 miles from the hotel.





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IMA NERC FALL CONFERENCE REGISTRATION FORM

Name: _____ Designation (s): _____

Nickname for Badge: _____

Title: _____

Company: _____

Address: _____

City, State, Zip: _____

Telephone: _____

E-Mail: _____

IMA Member Number: _____ IMA Chapter: _____

Do you require an electronic certificate for your CPE's? Yes No
CPE's are electronically posted to IMA member account

Seminar Fees:	By	On/After	Students w/ID
	7/15/2011	7/16/2011	
Full Program	<input type="checkbox"/> \$249	<input type="checkbox"/> \$289	<input type="checkbox"/> \$145
Day One Only	<input type="checkbox"/> \$199	<input type="checkbox"/> \$239	<input type="checkbox"/> \$120
Day Two Only	<input type="checkbox"/> \$199	<input type="checkbox"/> \$239	<input type="checkbox"/> \$120

Conference Cancellation/Refund Policy: A refund will be issued if cancelled by August 31, 2011. No refunds will be issued for cancellations after that date. NERC-IMA is only responsible for processing the Conference registration. IMA is not responsible for any travel or lodging expenses or out-of-pocket costs incurred. If for any reason you must cancel your Conference registration, please remember to cancel your hotel accommodations directly through the Sturbridge Host Hotel & Conference Center.

Please check the session tracks you are most likely to attend. Note: Attendees may change track later; this information is only to assist in the event planning.

	Monday September 19, 2011	Tuesday September 20, 2011
Morning Sessions:	General <input type="radio"/> CMA Prep <input type="radio"/>	General <input type="radio"/> CMA Prep <input type="radio"/>
Afternoon Sessions:	General <input type="radio"/> CMA Prep <input type="radio"/>	General <input type="radio"/> CMA Prep <input type="radio"/>

REGISTRATION

Payment information:

☐ Check enclosed payable to IMA-NERC

☐ VISA

☐ MasterCard

Card Number _____ / Exp. Date _____ / Security Code _____
(back of card)

Name as it appears on card (Please print) _____ / Authorized Signature _____

Billing address:

Address: _____

City, State, Zip: _____

MAKE CHECKS PAYABLE TO IMA-NERC

MAIL OR E-MAIL REGISTRATION FORM AND PAYMENT TO :

IMA-NorthEast Regional Council

c/o Linda M. Simmons

42 Farm Brook Court

Hamden, CT 06514

Phone: 203 988-4903

E-Mail: Linda.Simmons@comcast.net

Please check the website <http://www.nerc.imanet.org> for conference updates.

*IMA is registered with the National Association of State Boards of Accountancy (NASBA) as a "Group Live" sponsor of continuing professional education on the National Registry of CPE Sponsors. However, be aware that state boards of accountancy have final authority on the acceptance of individual courses for CPE credit.

Liability Waiver: I agree and acknowledge that I am undertaking participation in NERC-IMA events and activities as my own free and intentional act and I am fully aware that possible physical injury might occur to me as a result of my participation in these events. I give this acknowledgement freely and knowingly and that I am able to participate in NERC-IMA events and I do hereby assume responsibility for my own well-being.