IMA NorthEast Regional Council

5th Annual Fall Conference

September 16-18, 2012
Mystic, Connecticut

REGISTER *EARLY* AND SAVE!!

Education and CMA Exam Prep Tracks - Check it out!

ima
The Association of Accountants and Financial Professionals in Business

NorthEast Regional Council
Linda M. Simmons
42 Farm Brook Court
Hamden, CT 06514

Professional Development

20 CPE's

The Association of Accountants and Financial Professionals in Business

5th Annual Fall Conference

New This Year!!

Sunday Evening CPE Session!

Sunday September 16, 2012   7:15 pm-9:00 pm

"Thinner is Better -
iPad & iPhone Technologies"

Speaker: Eric Gendron 2.0 CPE

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Our Conference CPE Sessions Offer

PROFESSIONAL DEVELOPMENT

ETHICS   *OPERATIONS*   *TECHNOLOGY*

MOTIVATION   *BEST PRACTICES*

Presented by the IMA
NorthEast Regional Council

"OUR COMMITMENT IS YOUR SUCCESS"

CONFERENCE AT A GLANCE

CMA Exam Prep Sessions

Concurrent Track - Both days

See General Education Sessions for Breakfast, Lunch and Breaks

Monday - September 17, 2012

- 9:00 AM-12:00 PM

  "CMA Exam - Module Overview"

  Speaker: Tony Kvedar 3.0 CPE

- 1:45 PM-3:30 PM

  "Ethics for Today"

Note: *This joint session is for all conference attendees*

  Speaker: Len Long 2.0 CPE

- 3:45 PM-5:00 PM

  "CMA Exam - The Process"

  Speaker: Tony Kvedar 1.5 CPE

Tuesday - September 18, 2012

- 8:15 AM-11:15 AM

  "Mastering the BA II Plus Calculator for the CMA Exam"

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

  Speaker: Len Long 3.0 CPE

- 1:45 PM-4:00 PM

  "Defining the CMA Exam - Test Taking Techniques"

  Speaker: Len Long 3.0 CPE

The Association of
Accountants and
Financial Professionals
in Business

CONFERENCE AT A GLANCE

General Education Sessions

Sunday - September 16, 2012

- 4:00 -5:00 PM COUNCIL MEETING
- 6:00 -7:30 PM CONFERENCE CHECK-IN
- 7:15 -9:00 PM *"Thinner is Better—iPad & iPhone Technologies"*
  Speaker: Eric Gendron 2.0 CPE

Monday - September 17, 2012

- 7:00-7:45 AM BREAKFAST/REGISTRATION
- 7:45-9:00 AM *"The Danger Zone – How Small to Mid-Sized Companies Can Avoid Cash Shortfalls"*
  Speaker: Frank Armenio 1.5 CPE
- 9:00-10:15 AM *"Tax Law Update- Its Impact and Planning for the Year 2012 and the Future"*
  Speaker: Dr. Satya Mitra 1.5 CPE
- 10:15-10:45 AM BREAK
- 10:45-12:00 PM *"Business Rescue and Recovery in Challenging Economic Time (Lean May Not be the Immediate Answer!)"*
  Speaker: Tom Davis 1.5 CPE
- 12:00-1:15 PM LUNCH-CPE session
  "Tactical Allocation—Anticipate Market Forces, Now and for the Future"
  Speaker: Jeff Jacobson 1.0 CPE
- 1:15-1:45 PM BREAK
- 1:45-3:30 PM *"Ethics for Today"*
  Speaker: Len Long 2.0 CPE
- 3:30-3:45 PM BREAK
- 3:45-5:00 PM *"Can They Find You? Not SOS - SEO… Search Engine Optimization"*
- **Speaker: Brad Marcus** 1.5 CPE
  DINNER ON YOUR OWN
- 7:30-10:00 PM ***"Hospitality Social"***

Tuesday - September 18, 2012

- 7:00-8:15 AM BREAKFAST-CPE session
  "Creating a Culture that Drives Growth and Loyalty"
  Speaker: Dianne Durkin 1.5 CPE
- 8:15-9:30 AM *"Microsoft Excel: Advanced Functions and Techniques"*
  Speaker: Steve London 1.5 CPE
- 9:30-10:00 AM BREAK
- 10:00-11:15 AM *"Defining and Hiring the Right Employee"*
  Speaker: Mary Anne Calabrese 1.5 CPE
- 11:15-1:00 PM LUNCH-CPE session
  "Quiet or Outgoing? Navigating the Ins and Outs of Personality to Get Results"
  Speaker: Dr. Joyce Shelleman 1.5 CPE
- 1:00-1:15 PM BREAK
- 1:15-2:30 PM *"Green Business and Sustainability"*
  Speaker: Adam Ney 1.5 CPE
- 2:30-2:45 PM BREAK
- 2:45-4:00 PM *"Creating Jobs…the Importance of Investor Groups "*
  Speaker: Mark Bonney 1.5 CPE

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

The Association of Accountants and Financial Professionals in Business

Speakers

Frank Armenio CMA, CFM

Frank is currently a partner with B2B CFO. He has 30 years of broad based financial, operational experience in private and public multinational company roles such as CFO, Corporate Controller, Budget Manager, Sales Controller, and Revenue Accounting Manager. Frank is a strategic and operational-oriented accounting/finance professional with solid intelligence, planning, analysis, costing and financial reporting skills demonstrating a proven capability of building and managing the accounting/finance functions within a high growth environment. Frank has a mix of big company/small company experience. Bringing the big company processes and best practices and being able to translate it to a fast paced, entrepreneurial environment. Frank previously worked as a senior consultant in an Inc. 5000 accounting outsourcing firm for over three years touching many industries such as medical devices and non-profit healthcare. Frank's approach to business communications is direct and honest. Frank is a problem solver and has a "hands on" approach with the staff and can strategically with the owners. He has worked in manufacturing, medical devices, hardware, precious metals, clad metals, and non-profit industries such as healthcare and education. He has provided leadership and consulting services at various stages in companies such as start-up, high growth, steady state, and turnaround. Frank is a member of Boston Chapter of IMA NorthEast Regional Council.

Mark J. Bonney

Mark is Executive VP and CFO of Direct Brands, Inc., a leading direct to consumer marketing company headquartered in New York City. In that role Mr. Bonney is responsible for finance, planning, procurement, facilities, real estate, inventory management, as well as the company's distribution center and customer fulfillment activities. Mr. Bonney joined Direct Brands in March 2010 and has helped the company restructure operations, strengthen its B/S and return to profitability. From 2005 to 08 Mr. Bonney was Executive VP and CFO of American Bank Note Holographics, Inc. (ABNH), a global leader in product and document security, where he partnered with the CEO to implement a turnaround and growth strategy leading to a sale of the business in 2008 to JDSU, a leading manufacturer of communications test equipment and optical products. ABNH shareholders realized a 1000% percent return on their investment and Mr. Bonney received the CFO of the Year Award for Best Turn Around Manager for his efforts in the process. Following the sale to JDSU and until his departure in 2010, Mr. Bonney was VP and GM of the JDSU Authentication Solutions Group. From 2002 to 05 Mr. Bonney was an independent director of ABNH and several private companies. Mr. Bonney also provided interim leadership at a number of companies, most notably, Inline Plastics, a manufacturer of thermoformed plastic products and EDAC Technologies, a manufacturer of high precision parts and subassemblies for the aerospace market. Prior to 2002 Mr. Bonney spent 27 years in senior financial and operating roles at such publicly traded companies as Axsys Technologies, Inc., where he was President and COO and a Director; Zygo Corporation, where he was VP CFO and VP of Operations and Black & Decker and United Technologies. Mr. Bonney has been involved in the turn around of three public companies significantly increasing the value of each during and following his tenure. Mr. Bonney has extensive board experience having served on the board of ABNH prior to becoming its CFO as well as serving on the boards of Axsys Technologies, Inc. Threecore, Inc., ASearch LLC and various venture backed start-ups. He is currently Chairman of the Board of the Community Health Center, Inc. a $70 million full service not-for-profit health center in Connecticut and is a founder and former Chairman of the Angel Investor Forum, Inc., an organization of private accredited investors focused on helping entrepreneurs in the northeast realize their dreams.

Mary Anne Calabrese, SPHR

Mary Anne is Director of Search and Career Counseling at The Schegg Group. She is an accomplished human resources professional with years of increasing responsibility in the areas of coaching, staffing, employee relations, learning, organizational development, compensation and benefits. She has strong research, problem solving, project management, client management and interpersonal skills with an excellent record of delivering results. Mary Anne's career also includes customer service, sales management and finance. Prior to joining The Schegg Group, Mary Anne was the HR Staff and Recruiting Manager at Connolly Consulting. Previous to that, she was a Project Manager for Kenexa, a global staffing company and Associate Director, Human Resources at American Skandia. Her clients appreciate Mary Anne's pragmatic approach to resume building and her ability to prepare them for successful job interviewing. Mary Anne has a Bachelors degree in Business Administration from the University of Massachusetts and has earned the SPHR designation (Senior Professional Human Resources). The Schegg Group is a career management consulting firm that provides a unique and legendary brand of proactive, personal support to individuals and groups across the U.S. through Outplacement, Coaching, and Search services.

Tom Davis

Tom has an extensive background in Finance and Operations with several aerospace and industrial manufacturing companies over the last 35 year. Tom has held positions as COO, CFO and CEO specializing in revenue and profit growth and turnaround situations. Many of these roles were at organizations that were under stress from a variety of factors both internal and external. With an extensive background in lean enterprise initiatives he has developed and implemented several lean enterprise programs. Tom's organizational experience spans both corporate and entrepreneurial enterprises. Tom has an MBA from the University of Massachusetts and post graduate work at Boston and Syracuse Universities. Tom currently consults for organizations interested in mentoring, operational improvement and lean initiatives.

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, and her 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

The Association of Accountants and Financial Professionals in Business

SPEAKERS

Eric Gendron

As an associate for Action Link, Eric's current focus is the sale of Intel based computers and the training of sales associates at Best Buy and Staples locations throughout New England. With Eric's training and many years of experience, he has extensive knowledge of products and technology from Intel, Microsoft, Apple, Lenovo, Trend Micro, Norton, Dell, Western Digital, Cisco, and many other technology companies. Eric is a personal and professional user of many Apple products and is well versed with operating systems, standard applications and select advanced applications. He utilizes the benefits of Apple products to successfully day trade securities and manage his own portfolio.

Jeffrey Jacobson

Jeff is Sr. Vice President - Financial Consultant at RBC Wealth Management. Jeff was hired by Paine Webber as a Financial Advisor in 1992 and worked through the transition to UBS Financial until 2008 and then moved to join RBC Wealth Management as a Financial Advisor. Jeff offers his clients a Portfolio Focus discretionary account option for their investments. He has an MBA with a concentration in finance from Boston University and graduated with a degree in philosophy from Trinity College in Hartford, CT. Jeff has a long history of being selected to provide financial advice to executives at well known corporations. Jeff's Value Statement: "Great long-term results are only achieved with an advisory eye towards managing funds properly during all market conditions. Tactical Allocation provides the opportunities to produce this result. I emphasize client understanding of their investments and the strategies required given the "new normal" economy — an approach mandatory for responsible growth."

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 27 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 of CPA's Accountants in Industry Committee, 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 past Treasurer of the Vermont Symphony Orchestra and Past President of the Rotary Club of South Burlington VT.

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Steven London, CPA

Steven London holds a BS Degree in Accounting from Brooklyn College and is a licensed CPA in the State of New York. He has over 20 years of experience in leveraging technology to optimize efficiency and accuracy in the analysis and presentation of financial information. Steven is the President of Visicalc Consulting, LLC based in Central New Jersey and teaches a class entitled "Microsoft Excel – 25 Advanced Functions and Techniques You Need to Know." Once a sufferer of an acute fear of public speaking, Steven has worked to overcome this fear and now enjoys speaking to groups. He has achieved the rank of Competent Toastmaster (CTM) with Toastmasters International

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.

Brad Marcus

Brad is the Founder and CEO of Marcus Interactive, a Connecticut-based Website marketing company that specializes in Search Engine Optimization and social media marketing. Brad is a graduate of New York City's famed Stuyvesant High School and attended American University in Washington, DC. He was a sales and marketing executive in the home video business rising to sales manager for Ingram Entertainment, the world's largest distributor of home video entertainment. With the decline of video rental stores, Brad segued into computer sales, leading the technical training division of Catapult Software Training Centers, the PC training division of IBM. After teaching himself how to program and build websites, Brad worked briefly for Cartier's back-office operations before spending a decade in the automotive industry doing application development and website development and marketing for Proliance International. Since starting Marcus Interactive in 2009, Brad has helped small and mid-sized businesses level the playing surface and survive the recent recession through a combination of real world experience and technical know-how.

Dr. Satya B. Mitra Ph.D., E.A., CFP®

Dr. Satya Mitra is President of The Guru Tax & Financial Services, Inc. in Worcester, MA. He came to the USA in 1976 to pursue a career in biomedical research with a Ph. D. in Biochemistry. In 1990, Satya started a small tax practice after becoming an Enrolled Agent (Licensed to practice before the Internal Revenue Service). He is also a "Fellow" of the National Tax Practice Institute, Washington, DC. In 1993, he became a Certified Financial Planner and Registered Investment Advisor Representative. He is associated with the brokerage firm H. D. Vest Investment Services, Inc. of Irving, TX. He is one of the top producers of this firm. Dr. Mitra has been honored as a successful Mentor and a Chapter director by the H. D. Vest Investment Services, Inc. In 1994, getting instruction from his family priest (also known as "The Guru"), he quit his career in science and dedicated fulltime to the tax and financial services practice, with a strong mission to help people in the community. Satya is the President and owner of his firm named "The Guru Tax & Financial Services, Inc." Satya loves to speak and motivate people. His speech unfolding his success story, transitioning from his career in science to the financial advisor's field and migrating from India to USA, where he started and established a reputable business, is absolutely inspiring. His style draws you within him as he infuses his power in your mind and soul. As a Mentor and Chapter Director, every year, he speaks trains and motivates investment advisors of H. D. Vest Investment Services, Inc. to achieve success in their individual practices. Satya is absolutely dedicated to serve the community. Satya was the winner of 2007 Advisor Keynote Speaker competition at National Meeting of H D Vest Investment Services, Inc. at San Antonio, TX. He was awarded a contract to speak for Financial Forum, Inc. Satya is a member of National Speakers Association, New England Speakers Association, MA. and International Speakers Network.

Adam Ney

Adam is Assistant Director of Public Affairs for Connecticut Business and Industry Association (CBIA). He is a long-time employee (24+ years) of CBIA and besides helping to drive the association's grass-roots legislative activities in energy, environment, corporate responsibility and transportation; he also develops and coordinates the association's internal and external green initiatives. Adam also manages content for CBIA's Manufacturing and Small Business blogs. Adam is also managing director of AuctorVerno (AV) and launched www.buildingctgreen.com in 2006. The site is the state's leading on-line resource for green business and green building activities. Adam has worked with industry leaders, Non Governmental and governmental agencies. Adam believes that green is no longer a movement but a smart business practice that cuts costs and eliminates waste, doesn't harm the environment and can have a positive impact on an organization's bottom-line.

Dr. Joyce Shelleman, Ph.D

Joyce is an executive coach and organizational behavior consultant in private practice. Author of *The Introvert's Guide to Professional Success: How to Let Your Quiet Competence Be Your Career Advantage*, she applies more than two decades of experience to help quiet professionals navigate workplace dynamics and excel in their careers. Joyce has mentored or taught more than 1,000 professionals, leaders, and aspiring leaders to achieve insight to and mastery of organizations and behavior at work. A specialist in the unique features of knowledge work and professions like accounting, Joyce is a member of the School of Business faculty at the University of Southern Maine. She blogs "The Introvert's Guide to …"), creates and publishes quality professional development materials, and presents interactive workshops throughout New England. Her experience includes design and oversight of strategic planning processes in industry. Published in applied management journals, she is an Editorial Board member for the Journal of International Business Disciplines. In addition to her Ph.D. in Business Administration earned at the University of Pittsburgh, she holds a Bachelor of Arts degree in Psychology and a Masters degree in Public Administration.

NOTES

The Association of Accountants and Financial Professionals in Business

LODGING AND DIRECTIONS

LODGING

Hilton Mystic
20 Coogan Boulevard
Mystic, CT 06355

Tel: 855.761.0085
Fax: 860.572.0328
Web: HiltonMystic.com

Register Early!

To reserve a room at conference rates, please call the hotel and mention the Institute of Management Accountants NorthEast Regional Council. It is important to specify our group name when making a reservation. You may also make your reservation online through the Hilton Mystic website. Follow the link to the IMA conference.

Room Rates: $159 for a Single or Double
$159 for a Triple or 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 **August 18, 2012**.

Call-in reservations may be cancelled up to 24 hours prior to arrival without penalty. Reservations cancelled within 24 hours will be charged the first nights room rate. Please check with the Hilton Mystic.

Useful Links:

Hilton Mystic	www.hiltonmystic.com
Olde Mistick Village	www.OldeMistickVillage.com
Mystic Seaport	www.mysticseaport.org
Mystic Aquarium	www.mysticaquarium.org

DIRECTIONS

To the Hilton Mystic

From Boston: Southeast Expressway (Route 93 South) to Route 128 North, to Interstate 95 South, to Exit 90. At the end of the exit, follow the signs to the Mystic Aquarium. The Hilton Mystic is right across the street from the Mystic Aquarium. Approximate time: 1.5 hours.

From Hartford: Route 2 East to Exit 28S (395 South) to Exit 78, Route 32 South (New London), to Interstate 95 North, to Exit 90. At the end of the exit, follow the signs to the Mystic Aquarium. The Hilton Mystic is right across the street from the Mystic Aquarium. Approximate time: one hour and 10 minutes.

From New Haven: Interstate 95 North to Exit 90. At the end of the exit, follow the signs to the Mystic Aquarium. The Hilton Mystic is right across the street from the Mystic Aquarium. Approximate time: one hour.

From Newark / Northern New Jersey: New Jersey Turnpike North to George Washington Bridge Interstate 95 North, to Exit 90. At the end of the exit, follow the signs to the Mystic Aquarium. The Hilton Mystic is right across the street from the Mystic Aquarium. Approximate time: 2.5 hours.

From New York City: West Side Highway or FDR Expressway North to Interstate 95 North to Exit 90. At the end of the exit, follow the signs to the Mystic Aquarium. The Hilton Mystic is right across the street from the Mystic Aquarium. Approximate time: 2 hours and 15 minutes.

The Association of Accountants and Financial Professionals in Business

REGISTRATION

IMA NERC FALL CONFERENCE REGISTRATION FORM

Name: **Designation (s):**

First Name for Badge:

Title:

Company:

Address:

City, State, Zip:

Telephone:

E-Mail:

IMA Member Number: **IMA Chapter:**

CPE's are electronically posted to IMA member accounts. Please be sure to include your IMA member number.

Seminar Fees:	By	On/After	Full time Students
	7/15/2012	7/16/2012	With ID
Full Program	☐ $259	☐ $299	☐ $150
Day One Only	☐ $199	☐ $239	☐ $ 85
Day Two Only	☐ $199	☐ $239	☐ $ 85

Conference Cancellation/Refund Policy: A refund will be issued if cancelled in writing by **August 31, 2012**. No refunds will be issued for cancellations after that date. IMA-NERC is only responsible for processing the Conference registration. IMA-NERC 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 Hilton Mystic.

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

	Monday September 17, 2012	Tuesday September 18, 2012
Morning Sessions:	General ○ CMA Prep ○	General ○ CMA Prep ○
Afternoon Sessions:	General ○ CMA Prep ○	General ○ CMA Prep ○

PAYMENT INFORMATION

CHECK—payable to IMA-NERC ○ CREDIT CARD - MasterCard ○ Visa ○ Discover ○

Card Number______________________________

Exp. Date______________________Security Code(back of card)__________

Name as it appears on card (Please print)______________________

Authorized Signature______________________________

Billing address of credit card:

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 our website for conference updates
www.nerc.imanet.org

Photo Release Form
I agree and acknowledge that IMA-NERC may take photographs and make a video at IMA-NERC's 5th Annual Conference for reproduction in IMA-NERC educational, news, or promotional material, whether in print, electronic, or other media, including the IMA-NERC website. By participating in IMA-NERC's 5th Annual Conference, I grant IMA-NERC the right to use my name and image for such purposes.

Liability Waiver: I agree and acknowledge that I am undertaking participation in IMA-NERC 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 IMA-NERC events and I do hereby assume responsibility for my own well-being.