



STRAIGHT FROM THE HEART

HEART OF WISCONSIN IMA NEWSLETTER

March 2018

Estate Planning Basics

Attorney Alan L. Hougum will present a wealth of information on Estate Planning. He will discuss the advantages and disadvantages of wills, revocable trusts, how probate works and more importantly how you can avoid it. Valuable information about asset protection and estate recovery will be addressed. Protect yourself and those you love by learning the basics.

March 20, 2018 Dinner Meeting Agenda

Meeting Location: Sconni's
1239 Schofield Ave., Schofield

Board Meeting: 5:00—5:30 pm

Registration and Social Time: 5:30—6:00 pm

Dinner: 6:00—6:40 pm

Presentation: 6:40—7:30 pm

Buffet Style Dinner Includes:

- Apple Brandy Pork Loin
- Baked Cod
- Double Roasted Garlic & Scallion Mashed Potatoes
- Roasted Seasonal Vegetables
- Garden Salad

Investment:

\$25.00 Members & Guests

\$20.00 Professionals Between Opportunities & Retired Members

\$15.00 Students (UWSP Students—no charge due to donor support)

Please make dinner reservations by noon on Friday, March 16, 2018 at <http://heartofwisconsin.imanet.org>. Register within the event on the website.

Debits for Credits!

Still time to earn
credits.

Please see page 4 for
ways to earn credits.

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Speaker Biography

Attorney Alan L. Hougum, Attorney at Estate Planning & Elder Law

Attorney Alan L. Hougum grew up in Edgar, Wisconsin. Alan received his B.S. from the University of Wisconsin – Madison and graduated cum laude from the University of Minnesota Law School in 1999. After graduation, Alan returned to the Wausau area to practice in the areas of Estate Planning and Elder Law. Alan is a member of the State Bar of Wisconsin, the Minnesota State Bar Association, and the Marathon County Bar Association. Alan currently resides in Wausau with his wife and two young children.

President's Message

Board positions are being filled for next year. Please step up and serve – it only takes an hour or two each month. We always welcome new blood members who are interested in making the Heart of Wisconsin a useful and productive chapter. Attendance at every meeting is not required.

We've got a great set of meetings left including excel training with Mr. Excel. Please consider serving. As always, I'm welcome to feedback.

Kimberly Buehler, CMA, CFM, CPA

2017—2018 Chapter President

Heart of Wisconsin Chapter of the Institute of Management Accountants

<http://heartofwisconsin.imanet.org>

Congratulations!

March IMA Member Anniversary

James Belisle—25 years



2017—2018 Board of Directors

President

Kimberly Buehler

Admin Team Leader

Mary Tomazin

A complete list of board members and contact information can be found on the website at to heartofwi.imanet.org.

Contact Us

Find us on Facebook

or

Visit us on the web at <http://heartofwisconsin.imanet.org>

2018-2019 Board

If anyone is interested on serving on the board next year, please contact Kim Buehler at Kim@accounting-offices.com.

Upcoming Events!

Tuesday, April 24

Monthly Dinner Meeting

Jerome Segura, Attracting & Retaining Young Talent

Location: Bullheads, Mosinee

SAVE THE DATE! Tuesday, May 15

Mr. Excel—Half Day Seminar worth **4 CPE Credits**

Location: Sentry World, Stevens Point

Registration will begin at noon

Investment:

\$50.00 IMA Members

\$60.00 Non-IMA Members

\$25.00 Students

See page 5 for additional information!

UWSP Accounting Leadership Fund

Donations to the **UW-Stevens Point Accounting Leadership Fund** are welcome, with the goal of continuing support of UWSP student participation at IMA meetings.

Checks would be made payable to UWSP Foundation, with **Accounting Leadership Fund** in memo line, and mailed to:

UWSP Foundation

2100 Main St.

Stevens Point, WI 54481

Debits For Credits

It's not too late to earn credits. See page 4 with a list of possible ways to earn points.

Debits for Credits

You can earn points by participating in the following activities:

Be/Become an IMA Member—5 points
Attend a dinner meeting—5 points (per meeting)
Participate in an IMA Community Event—10 points (per event)
Donate to food/clothing drive—5 points
Pass CMA exam part—25 points (per part)
Earn CMA Certificate—15 points
Attend a board meeting—5 points (per meeting)
Attend a networking event (student)—5 points (per event)
Attend a networking event (professional)—15 points (per event)
Like the December Ethics meeting notice on Facebook—5 points
Like the May Mr. Excel meeting notice on Facebook—5 points
Pass the new CSCA Exam—25 points

Good Luck!

CMA Exam Prep Material

The Heart of Wisconsin IMA Chapter has partnered with Gleim to ensure your success on the CMA exam!

Gleim CMA Review has the largest exam-emulating test bank of multiple-choice and essay questions, our popular CMA exam instructional videos, and a no-hassle Access Until You Pass® guarantee. [Pass the CMA](#) exam with Gleim CMA, the #1 CMA Prep Course on the market which has trained more CMAs than any other course available.

Place your order directly online by going to gleim.com/IMAHoW or contact Melissa Leonard at 800.874.5346 or imachapters@gleim.com to learn about the significant discounts you are eligible for as an IMA Chapter member.

Leadership Training Session

Each year the Mid-America Council holds a regional Leadership Training Session (LTS). The one-day workshop focuses on leadership development of IMA members. A portion of the program discusses leadership for the local chapter. However, the majority of the day is geared toward professional leadership and current accounting and finance issues. These programs provide practical information that attendees can use on the job or in their community leadership positions. The biggest attraction is the ability to exchange ideas and experiences with fellow professionals. Student members also gain the opportunity to learn more about the business environment in a non-classroom setting from professionals already in their future careers. The days events qualify for 7.5 hours of CPE.

When: Friday, April 27, 2018

Where: NUI Rockford Meeting & Conference Center, Rockford IL 61108

Investment:

Free Heart of Wisconsin IMA Members and full-time students
\$30 IMA Members
\$85 Non-IMA members

Registration information is available at
<http://www.midamerica.imanet.org/events.htm>

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FOR MORE INFORMATION: www.MrExcel.com

STEVENS POINT WI

05/15/2018

4 CPE Credits

Tuesday, May 15, 2018

Join us on May 15, 2018 for a half day seminar by Mr. Excel for Microsoft Excel 2010/2013 training and earn 4 CPE credits.

Get an immediate return on your investment as you learn efficient, powerful tips, tricks, and techniques to save you hours every week. Sessions are fast-paced and based on topics most relevant to today's business users.

Training will include:

- Excel best tips and shortcuts
- Functions and Formulas
- Pivot Tables
- Macros
- What's new in 2010/2013

Course Location:

SentryWorld Sports Center
601 Michigan Ave N
Stevens Point, WI 54481

Registration begins at noon
Course 12:30—4:00

Refreshments provided at break

Instructor: Bill Jelen

About Instructor: Bill Jelen is the host of MrExcel.com and the author of 54 Excel books. He has made over 80 appearances on TV's Call for Help with Leo Laporte and writes the Excel column for Strategic Finance magazine. He has produced over 2,100 episodes for his daily video podcast Learn Excel from MrExcel. Before launching MrExcel.com, he spent 12 years "in the trenches" in accounting, finance and operations departments of a publicly held company.

IMA Member Fee: \$50

Non-IMA Member Fee: \$60

Student Fee: \$25

Payment is required at time of registration.

Registration includes a copy of Power Excel with MrExcel - a \$40 retail value!

Register online at <http://heartofwisconsin.imanet.org>

Email Questions to: Cinda.Mijal@sentry.com

REGISTRATION DEADLINE: MONDAY, MAY 1st



Heart of
Wisconsin
Chapter



The Association for
Accountants and
Financial Professionals
in Business