



The Association of  
Accountants and  
Financial Professionals  
in Business

DAYTON CHAPTER



The

January, 2023

# Balance Sheet

VOL. 96, NO.8

DAYTON CHAPTER

January 2023 [Registration Links](#)

## FIRST SESSION SPEAKER

January 17, 2023  
6:00 – 6:50 p.m.  
Virtual On24 Meeting

**Dustin Stamper**  
*Grant Thornton*

### *Federal Tax Update*



Dustin Stamper is a managing director in Grant Thornton's Washington National Tax Office and leads the tax legislative affairs practice for the firm. Dustin is responsible for monitoring tax legislative and regulatory activity for the firm.

Dustin's duties include providing updates, insight and technical analyses of legislative and regulatory developments; communicating with legislative staff on tax priorities; and developing published articles and official comments on regulatory matters. Dustin also serves as technical resource on opportunity zones, excise taxes and credits, passive activity rules, the alternative minimum tax, and the net investment income tax.

Dustin spent four years on Capitol Hill for Tax Analysts covering Federal and State tax legislative developments – as well as regulatory developments at the IRS and Treasury. Dustin is an enrolled agent and is a member of National Association of Enrolled Agents.

**REGISTER**  
**HERE**

## SECOND SESSION SPEAKER

January 17, 2023  
7:00 -8:00 p.m.  
Virtual On24 Meeting

**Rinku Bhattacharya, CMA, CPA**  
*Lutheran Social Services*

### *Building an Operations Disaster Recovery Toolkit*



Rinku Bhattacharya, CMA, CPA has more than 25 years of financial and administrative experience in financial management, information technology, strategy, and infrastructure building, with a specialty in the nonprofit sector.

Rinku has had a progressively responsible career working in all aspects of finance and is currently the CFO for Lutheran Social Services and is also an adjunct professor of Accounting at Manhattanville College.

Rinku serves on the global board of the Institute of Management Accountants, serving as the Vice Chair of the DEI Committee and on the Global Markets Committee. In addition to IMA, Rinku serves on the boards of Cluster Inc. and the First Lego League of Hudson Valley. She has a doctoral degree in Accounting (DPS) from Pace University.

### INSIDE

- **President's Message**
- **Climate Risk**
- **Ima23 Conference**
- **February Sneak Peek**
- **Member Updates**
- **Upcoming Webinars**

Visit the web-site at <http://www.dayton.imanet.org/>



## President's Message



Wow!, that holiday season flew by and that 2023 has arrived already! I hope you survived the storm without any burst pipes. It was so nice to spend time with the group that was able to come out and join us at the annual Holiday Social.

For January, we decided to go virtual to make it easy on everyone with the busy schedules and not having to predict the weather. We are excited to have a Managing Director from Grant Thornton providing the annual Federal Tax Update. Our second hour will be presented by Rinku Bhattacharya, on the important risk management topic of Disaster Recovery Planning. The virtual session allows us to take advantage of speakers around the country.

We are also finalizing the plans for our annual Student Night Event. We are very excited to be bringing you an engaging presentation with Your Nerdy Best Friend, (Beth Ziesenis). She will help us Power our Productivity through Tech Tools. We also hope to have Steve McNally, IMA Chair Emeritus join us.

We will work on planning another social, so stay tuned and we will get those details out when available.

We hope to "see" you on the virtual CPE Sessions! Stay safe and warm.

**Paul Myers**  
**Chapter President**

### IMA Releases Report on Climate Risk and Readiness in Business

**Montvale, N.J., December 15, 2022** – [IMA® \(Institute of Management Accountants\)](#) today released a green paper that offers insights on how the finance functions of companies are responding to climate-change and other sustainable business risks, often referred to as ESG for environmental, social, and governance. Based on a survey of IMA's diverse, international membership, "[Climate Risk and Strategies: Finance Function Readiness to Meet Accelerating Demands](#)" provides a snapshot on the current state of risk management processes around these emerging areas. The perspectives of IMA's unique constituency, accounting and finance professionals in businesses of different sizes, industries, and geographic regions, provided a means for understanding internal practices and dynamics.

Despite both internal and external drivers to advance corporate reporting mandates around climate change, the results suggest that while large, public organizations have taken some steps toward identification, assessment, and management of these risks and potential opportunities, movement among companies in the broader economy remains slow. As a green paper, the study invites other researchers and thought leaders to continue to investigate deeply into the perspective and needs of participants in the broader economy, particularly small and medium sized businesses, in responding to climate change and similar ESG matters.

To read the rest of the article or download the full report, [link here](#).



## IMA ANNUAL CONFERENCE REGISTRATION NOW OPEN

**SPECIAL PRICING THROUGH JANUARY 13TH!**



### **Step up at IMA23**

Get out from behind your screen and join the premier educational event for accounting and finance leaders. IMA23 is a one-of-a-kind experience, a chance to enjoy dynamic discussions and powerful collaborations. In-person, inspiring, and engaging, IMA23 will help you step up your career and drive change.

#### **Connect**

Engage in deep conversations and build lasting relationships.

#### **Experience**

Create your schedule to drive your career goals.

#### **Learn**

Discover new ideas from peers and world-class experts.

## **Thinking about the CMA Certification**

[Find out more Here](#)

**IMA CHAPTER MEMBERS**  
**SAVE 25%**  
ON THE #1 MOST COMPREHENSIVE CMA REVIEW  
**SAVE NOW**

## Upcoming Akron IMA CPE Sessions

### **Updating Your Excel Data Analytics Skills with Mr. Excel (Bill Jelen)**

**Wednesday, February 22, 2023**

**6:30 – 8:30 pm ET (registration [link](#)).**

### **Ripped from the Headlines: Accounting for Fraud**

Francine McKenna (lecturer at Wharton Business School and investigative journalist),

**Wednesday, March 8, 2023, 6:30 –**

**7:30 pm ET (registration [link](#)).**

Visit the web-site at <http://www.dayton.imanet.org/>

## SNEAK PEEK AT FEBRUARY SESSION

We are excited to be hosting Your Nerdy Best Friend, Beth Ziesenis, at our February meeting.

Beth has been a keynote speaker at IMA's Annual Conference and will help bring you tech tools to power your productivity in a fun and engaging presentation!

Discover how to use free and bargain technology tools you never knew existed to work more efficiently with your teams, get organized and finally get stuff done!

- Discover low-cost, high-value apps and tech tools that you can start using right away
- Get new ideas to increase efficiency, improve relationships and get things accomplished



This session will be hybrid and begin at 5:30 p.m.  
(2/21/23)

## NOTEWORTHY CHAPTER MEMBER NEWS

### CONGRATULATIONS!

- **James Rice** – for achieving the CMA Certification
- **Megan Will** – for achieving the CMA Certification

**The chapter would also like to give recognition to:**

- **Robert Chelle** – for achieving **50 years with IMA!**



**We would also like to welcome our newest members:**

**Lisa Ferguson  
Kevin Garman  
Scott Bentley  
Stephen Rader**



## UPCOMING WEBINAR SCHEDULE

### INSIDE TALK

#### **Why Data is the Core to a Future Finance Architecture**

**Wednesday, January 11, 2023 from 1:00 p.m. to 2:00 p.m. (EDT)**

Field of Study –Finance – Technology & Analytics

Join us for a discussion of the “data nirvana” for a finance function and why it is critical to enabling CFOs to deliver against their new mandate of responsibility for corporate finance governance, while serving as a strategic business partner delivering actionable business insights to drive better outcomes and profitable growth.

With many finance functions saddled with complex spaghetti technology architectures and fragmented data silos, Nick Shah and Alan Berkley of Aptitude Software will explore subledger and data architecture design, and discuss what a modern finance architecture looks like. They will examine the power of digital technologies and how they can be leveraged to deliver better finance solutions for the future without creating additional tangled messes and further complexity.

#### **Key Trends That Will Reshape Accounting and Finance in 2023**

**Wednesday, January 25, 2023, from 1 p.m. to 2:00 p.m. (EDT)**

Field of Study – Information Technology – Technology & Analytics

As we forge ahead in 2023, organizations need to continue to embrace change, find new ways to grow, and prepare for what's ahead. Sage executives have collaborated with their customers, partners and thought leaders over the past few months to gauge insights on the key trends set to reshape accounting and finance in the upcoming year. Join Judy Hanover and Aaron Harris of Sage, as they discuss their findings and analyze how innovative businesses can stay one step ahead in an increasingly competitive landscape over the coming year.

#### **LinkedIn Like You've Never Leveraged It**

**Monday, January 30, 2023, from 10 a.m. to 11:00 a.m. (EDT)**

Field of Study –Personal Development – Leadership

Join us as Daniel Alfon provides a simple system that will help you focus on what's important: getting hired and boosting your finance and accounting career. Daniel will evaluate the LinkedIn profiles of a few IMA members, revealing ways to optimize your profile using little known facts about LinkedIn, LinkedIn Connections, and LinkedIn Jobs. He will also share four steps that will help rank you higher when recruiters perform searches, and other ways to use LinkedIn to give you a head start and a competitive advantage.

Check out all IMA webinars [http://www.imanet.org/learning\\_center/IMAWebinars.aspx](http://www.imanet.org/learning_center/IMAWebinars.aspx)

## COUNT ME IN PODCAST

### Some Recent IMA Podcasts

Here are some IMA podcasts you might especially like:

- [Ep. 97: Eli Amdur - Explaining What Today's Business Environment Means for Your Personal Development](#)
- [Ep. 90: Andy Kettlewell - Volatility of Supply and Demand](#)
- [Ep. 83: Sandhya Sriram - Strategic Planning, Prioritization, and Motivation](#)

All IMA podcasts can be accessed via this link:

<https://podcast.imanet.org/episodes>

