Something for Everyone - December Meeting

Meeting Date & Time:
Wednesday, December 4 at 1:00 pm
Registration at 12:45 pm

Meeting Location
CJ Callaway’s

Not sure how we could pack more information into one meeting! This one has something for everyone in your organization and our holiday social to boot!

IRS Repair Regulation/Tax Update

First, Tracy Peterson and Mark Broders of McGladrey LLP will present all we need to know on the new IRS Repair Regulations in effect beginning in 2014 (or 2013 if you want to jump in early!)

They will also cover important 2013 year-end tax planning opportunities as well as what we can look forward to in 2014...at least until Congress changes it.

Fraud Prevention

There has been a recent spike in fraud cases in our area with some of our member companies having experienced some of the higher profile cases first-hand. Learn how to prevent, detect, and deal with fraud from Mike Iverson, a 15-year veteran of the SFPD, and Patrick Marino, a 13 year veteran of the SFPD, both working in the Sioux Falls Police Department Fraud Section.

Proactively Managing Worker’s Compensation and Workplace Medical Fraud

Finally, Becky McEnery, Risk Management Consultant and Legal Medical Consultant working for Henry Carlson Company, will discuss strategies for employers to be proactive in managing their worker’s compensation and workplace medical fraud cases.

Becky is the President and Owner of Quality Care Litigation Support and Investigative Services LLC in West Monroe, LA. She has a Bachelor's Degree in Science, Certification in Legal Medical Consulting, as well as a License to Investigate Medical Related Cases. More than 12 years ago, Becky recognized the need for a comprehensive service that would offer medical expertise, as well as needed assessment and review analysis and, research in medical related cases. As a Legal Medical Consultant, Becky and her QCLSIS staff have assisted clients in various cases, not limited to Medicare fraud, medical fraud in the workplace, workers compensation and workers compensation fraud, risk management, medical malpractice, personal injury, and wrongful death.

If you have questions or would like to know more, please contact Kit Gleason at (605) 275-1616 or gleason@maguireiron.com.

For additional information on CFMA and its benefits see our website at www.cfma.org.
President’s Message

It’s hard to believe, but year-end is fast approaching! Hopefully it’s been another successful year for our members. One way that we hope to help add to the success is to continue to offer great opportunities for our members to network, learn and share.

One of those opportunities is coming up fast – our December meeting and social is being held Wednesday, December 4 at CJ Callaway’s. We have a packed agenda, including an update on the new repair regulations issued by the IRS that will impact ALL companies, a discussion on fraud prevention and detection, and discussion on strategies for employers to manage worker’s compensation and workplace medical fraud cases. There will be something for everyone – a great way to see the benefits of CFMA in action.

After the December meeting, please plan to stay for our annual holiday social. Appetizers will be provided and drinks will be available as well. It’s always a great way to network with other members and enjoy some holiday cheer!

Please remember that CFMA National offers a number of great benefits as well. It’s closing in on that time when the CFMA Annual Financial Survey and the IT Survey are available, which are great tools for benchmarking your company against your peers. Additionally, a number of other resources are available, including CFMA’s Building Profits magazine, monthly webinars filled with information (and CPE!), and industry news. If you haven’t visited CFMA’s website recently, I would encourage you to go to www.cfma.org and see all that it has to offer.

Chapter Officers and Board Members

· Ben Ellingson, President
· Kit Gleason, Vice President
· David Honner, Treasurer
· Kevin Moore, Secretary
· Cindy Cosand, Board Member
· Jarrod Muller, Board Member
· Jodi VanEmmerik, Board Member
· Ryan Dulaney, Board Member

Would you like to sponsor a meeting?

Meeting sponsorships are available for $150. Your sponsorship will include a display of your company logo at our meeting, announcements during the meeting and a mention in our newsletter. We also offer sponsorships in our newsletter for $250 for one year. For more information call Joel Van Egdom at (712) 722-1662 or e-mail him at joel.vanegdom@interstates.com.

Have you received a promotion, a certification, or have some other good news? Share it with other local CFMA members through this newsletter.

Send your information to one of the publicity committee members listed to the right.
2013 Heartland Conference

The 9th Annual CFMA Heartland Conference was held on September 26 and 27, 2013 at the Ameristar Hotel in Council Bluffs, Iowa.

This conference historically provides excellent value for a very affordable price, and this year’s conference did not disappoint! In addition to providing excellent CPE topics, the conference again offered numerous opportunities for networking with other financial professionals from around the Midwest. Our Siouxland Chapter was again well represented with 20 participants. The Kansas City chapter brought a record 30 participants. In addition to the conference, a number of attendees also used this opportunity to participate in accounting software user-group meetings prior to the conference.

Here are some facts about the 2013 conference:

- 88 participants and speakers (an increase of 10% over last year).
- 6 different chapters represented: Kansas City, Siouxland, Iowa, Nebraska, Twins Cities, and St. Louis
- 11 sponsors
- 50 different companies represented

A variety of topics included:
- Making Wellness a Financial Positive
- Tax Update
- Being Ready for Obamacare
- Strategic Planning Leadership in the New Normal
- Accounting Update
- First Me, Then Others
- Creating One’s Own Brand and Personal Leadership Mission
- Going Home Alive

The Heartland Conference is put on through a joint effort by the Iowa, Kansas City, Nebraska, and Siouxland chapters. Representatives from each of the chapters participate on the planning team and do an excellent job putting together this conference each year. The planning team reviews the feedback from each conference and reacts to that feedback in order to maximize the conference value and experience each year.

If you have ideas for topics or speakers for next year’s conference, or have an interest in participating in the planning for the 2014 Heartland Conference, please contact Ron Heemstra from our local chapter.
Upcoming Events

- CFMA KnowledgeNOW Webinar
  Economic Outlook with Anirban Basu,
  Sage Policy Group,
  Friday December 13, 2013

- CFMA KnowledgeNOW Webinar
  2014 Tax Update with Todd Taggart &
  Mel Schwarz, Grant Thornton,
  Wednesday January 8, 2014

September 2013 Meeting

The September 18 CFMA meeting was held at CJ Callaway’s and Health Care Reform was the topic. First off was Ross Manson from Eide Bailly and he highlighted the employer basics including what makes a large employer and the associated penalties for not offering health insurance. He discussed the measurement period and stability period and gave specific examples. The new fees with the Affordable Care Act were discussed as well.

Then he presented on the Health Care Exchanges and the importance of making an informed decision on all aspects of the law by using analytical procedures to determine what is in the best interest of the business.

Next we had Bill Rezac from Boen & Associates and Suzie Hurley from Silverstone Group discuss what they are currently seeing in the market. They discussed the Exchanges, the Navigators (people who will assist customers in finding health insurance) and what they are seeing in Employer and Group Plan Designs as well as outcome based wellness initiatives. The slides from all 3 presentations are on the Siouxland chapter page at www.cfma.org.

Committee Chairs

We have always encouraged members to get involved in their Siouxland Chapter of CFMA. Active involvement makes for a rewarding and enjoyable chapter. To get involved in your Chapter, please contact any of the committee chairs listed here or any of the Board members (listed below):

- Membership: Jarrod Muller
- Public Relations: David Honner
- Succession Planning: Ben Ellingson
- Programs: Kit Gleason
On behalf of the Publicity Committee, we would like to wish you all a Joyous Holiday Season and a Bright and Profitable New Year.