



The Association of
Accountants and
Financial Professionals
in Business

Spotlight

EVANSVILLE CHAPTER 076



Inside this issue:

February Lunch Meeting Info	1
President's Message	2
2016-17 Board of Directors & March Lunch Meeting	3
Save the Dates	4
Newsletter Deadlines & Other Chapter Info	5
MEF Speaker	6
USI Scholarship Donation Form	7

Volume 17-02

Page 1

February Lunch Meeting Info

Tuesday, February 14th

11:45 a.m. - 1:00p.m.

Innovation Pointe - 2nd Floor

Jeanette Maier-Lytle, Accounting Professor—USI “Case Study Analysis at USI”

Jeanette is an accounting instructor and case study coach at the University of Southern Indiana. She is currently on sabbatical from USI. She will be performing some research and writing on faculty internships and the impact student participation in case study team competitions has in business and the community. She graduated with a Bachelor of Science degree in Accounting and a Masters of Business Administration from USI. She also serves on the Finance Committee at Lynnville United Methodist Church and the Tecumseh High School Booster Club. She has been a member of the IMA for over 25 years.



A variety of boxed lunches from Just Rennie's will be served on a first-come, first-served basis. Everyone who RSVPs will receive a lunch. RSVP at evansville.imanet.org/meetings-events today!

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President's Message

Dear IMA Members:

I hope everyone has started 2017 well. This is a big month for our local IMA chapter. We have our monthly lunch meeting on February 14th (Reminder this is also Valentine's Day). Jeannette Maier-Lytle - Professor of Accounting at University of Southern Indiana and a long time member will be our speaker. Jeannette will speak about the successful case studies analysis at USI.

We also have a meeting for the board of directors at Koch Enterprise. The meeting will take place on February 16th at 5:30 pm. It is a busy time of year for all financial and accounting IMA members, but hope you can make time to meet with us there. Everyone is welcome and we encourage any new input to better serve our members.

Later in the month, Mary Pat Trainum, our treasurer, has presented us with a wonderful opportunity. She has been able to secure a grant from the IMA to have a Memorial Education Foundation Event presentation. We will be having this event on February 28, at 3:30 pm, at the Browning Room B, at the Evansville Central Library.

Our presenter for February 28 event, Betsy Westhafer, will be presenting "From Point A to Point Beast". This is a great presentation and is free of charge for members and their guests. This is also a chance for our local IMA to grow. We would love to have a big turnout! Please invite anyone interested in the presentation or in the IMA. There will be refreshments after the presentation. Please register for this event at evansville.imanet.org/meetings-events.

As always, your Evansville IMA Board is dedicated to providing great service. Please let us know if you have any suggestions or ideas. I hope to see you all at one of our future events and I am looking forward to another great year!

Sincerely,
Dumitra Pascu



The Lincoln Trail Regional Council meeting for July will be held in Evansville! Tentative dates of July 21 for social hour and July 22 for the meeting. We would love to see a big turnout for this event! More details to be provided in the next few months. Save the dates!

Regency Properties is hiring!

Visit <https://regency-prop.com/employment-opportunities/> for more information or to apply

Sr. Accountant

Responsible for assisting with month-end processes, budgeting, forecasting, audit functions, and maintaining fixed assets in depreciation system.

Tenant Accounting Specialist

Responsible for all property management postings, billing tenants and participating in annual reimbursable expense reconciliations.



2016-17 Board of Directors

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If you are interested in filling any of the open board positions or becoming more involved, please contact
Dumitra Pascu at IMAPresident076@gmail.com

March Lunch Meeting — Tuesday, March 14th

11:45 am—1:00 pm

**Brian Carroll, Attorney - Johnson Carroll Norton, Kent and Goedde, P.C.
Estate Planning/LT Care Planning”**

Innovation Pointe - 2nd Floor

Brian K. Carroll is a partner at Johnson Carroll Norton Kent & Goedde P.C. Mr. Carroll practices in the areas of business law, estate and trust planning and administration, real estate and elder law. He is a Certified Elder Law Attorney by the National Elder Law Foundation and a Certified Estate Planning and Administration Specialist by the Trust and Estate Specialization Board. He is the Southern Indiana Representative of the Special Needs Alliance, a national network of lawyers dedicated to disability and public benefits law.



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Save the Dates!

Volume 17-02

Page 4

RSVP for Evansville IMA Events at evansville.imanet.org/meetings-events

- 2/14/17 Lunch Meeting (11:45 am—1:00 pm)
Jeanette Maier-Lytle, Accounting Professor—USI
“Student Experiences and Coaching”
Location: Innovation Pointe
2nd Floor (Just Rennie’s)
- 2/16/17 IMA Board Meeting—All Welcome to Attend
Koch Enterprise
- 2/28/17 MEF Grant Speaker (3:30 pm-4:30 pm)
Betsy Westhafer, Certified Mental Performance Coach
“From Point A to Point Beast”
Browning Room B, Downtown Library
More info on page 6
- 3/14/17 Lunch Meeting (11:45 am—1:00 pm)
Brian Carroll, Attorney-
Johnson Carroll Norton, Kent and Goedde, P.C.
“Estate Planning/LT Care Planning”
Location: Innovation Pointe
2nd Floor (Just Rennie’s)
- 3/23/17 4th Thursday CPE Night (3 Hrs)
Regency
- 3/31/17 Airport Tour (3:00 pm)
- 4/11/17 Lunch Meeting (11:45 am—1:00 pm)
Shawn Norris— Employee Benefit Consultant—NFP
“Employee Benefit Plans”
Location: Innovation Pointe
2nd Floor (Just Rennie’s)
- 4/22/17 All Day CPE
United Leasing
- 4/27/17 4th Thursday CPE Night (3 Hrs)
United Leasing
- 5/25/17 Dinner Meeting—TENTATIVE
- 6/3/17 Summer Picnic!!!
- 6/17/17 IMA Annual Conference
Location: Denver, CO
- 7/21&22/17 LTRC Meeting in Evansville



Newsletter Deadlines

IMA *Spotlight* is published on a monthly basis by the Evansville Chapter of the IMA. In an effort to keep the newsletter relevant, useful, and informative, feedback on the contents for the newsletter is welcome. Members desiring to contribute transcripts, bulletins, and other items of interest to the *Spotlight* should contact Andy Peistrup at ampeistrup@yahoo.com.

Feb 20	Mar Issue
Mar 20	Apr Issue
Apr 20	May Issue
May 20	June Issue
June 20	July Issue

ATTENTION: There is no such thing as a free lunch or dinner.

Our Evansville IMA must pay for meals based on all reservations whether you attend or not. We would appreciate your cooperation in honoring your reservations and paying for your meal. If you were unable to attend, please remit payment to: IMA Evansville, P.O. Box 184, Evansville, IN 47702.

Thank You!

IS YOUR IMA PROFILE UP TO DATE?

If you have changed jobs or had other status changes please visit the IMA Global website to update your profile. www.imanet.org

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High Impact Speaker, Betsy Westhafer,
Mental Performance Coach, will present
“From Point A to Point Beast”

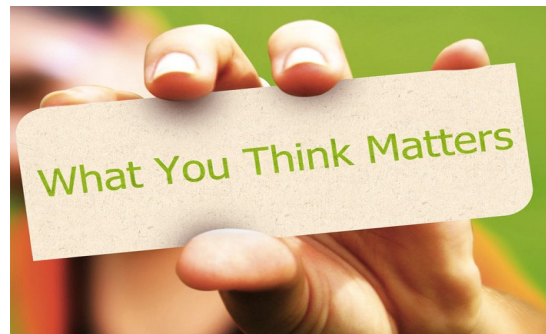
When: February 28, 2017 at 3:30 pm

Where: Browning Room B, Central Library
Downtown

Every result begins with a thought. In this interactive workshop, you will learn techniques for tapping into your natural instincts and using your mindset to get the results you desire. By incorporating a “Personal Mindset Strategy” into your short- and long-term plans, you will have a unique advantage that will elevate you and your organization to the highest levels of achievement. If you prefer to have your mind working for you rather than against you, you won’t want to miss this presentation.

Register for this free workshop at [http://
evansville.imanet.org/meetings-events](http://evansville.imanet.org/meetings-events)

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Indiana Tax Credit

Indiana residents qualify for the Indiana College Credit when they make charitable gifts to colleges and universities located in the State of Indiana, including the USI Foundation. Individuals who make charitable gifts of up to \$400 on a joint return, or \$200 on a single return, are allowed a credit against their Indiana state adjusted gross income tax liability. File Schedule CC-40 with your Indiana tax return to receive up to \$200 credit on a jointly filed return or up to \$100 credit on a single return. The amount of a corporation's credit is equal to 50 percent of the total amount given during the tax year. However, the credit may not exceed the lesser of a) 10 percent of the corporation's adjusted gross income tax liability, or b) the amount of \$1000.

Federal Tax Deduction

Every dollar of your charitable gift to the USI Foundation qualifies for a deduction as a contribution on your federal income tax return. Individuals must itemize deductions and the deduction is subject to the general limitation of 50 percent (30 percent for gifts of appreciated capital gain property) of adjusted gross income. A corporation may generally deduct charitable contributions of up to 10 percent of its taxable income.

Matching Gift

Matching Gifts double your dollars. Over 1,000 U.S. corporations have established programs to match gifts made to colleges and universities by their employees, and in some cases a retiree or the spouse of an employee. Check with your company's Human Resources Department for procedures to follow. Take this opportunity to increase your gift to USI. You will receive full credit for a matching gift.

Gifts of Stock

Transferring gifts of stock directly to the USI Foundation may enable you to avoid capital gains tax. Please contact your own advisor.

Transferring Gifts of Stock

Either: Arrange for an electronic stock transfer by notifying your broker or agent to contact the Foundation Accounting office at 812/465-1081 for up-to-date transfer instructions.

Or: Mail your stock certificate without endorsing it and mail in a separate envelope a signed stock power authorizing gift of stock to USI Foundation. Mail to: USI Foundation, 8600 University Blvd, Evansville, IN 47712.

Or: Deliver your endorsed stock certificate to Old National Trust, Old National Bank in Evansville.

Will/Bequest/Trust

____ I have provided for the University of Southern Indiana in a will or other arrangement.

____ I would like information about how to make a planned gift.

The USI Foundation is a 501(c)(3) not-for-profit corporation. It issues a receipt for every gift.

The USI Foundation's fiscal year is July 1 – June 30