



AZ Valley  
of the Sun  
Chapter

# The Roadrunner

July 2019

Volume 21, Issue 1

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## 2019 IMA Member Meeting

This year's conference started with the annual member meeting.

Our outgoing IMA Global Chair Ginger White shared updates on IMA's progress during the 2018-2019 year. During the Annual Meeting of Members and Conference Kick-Off, IMA Chair Ginger White said, "This Conference is about reflecting on the past, but also looking towards the future and renewing our collective commitment to seeing IMA thrive for another 100 years!"

Ginger White welcomed 2019-2020 IMA Global Chair Christian Cuzick.

"IMA has been the thought leader I turn to for insights that helped me do my job better, at each successive stage of my own career development. It is very meaningful to me to be IMA's Chair during its 100th Anniversary."- Incoming Chair, Christian Cuzick

Over 1000 attendees enjoyed 3+ days of education, fun and networking.  
#IMA100Years



The July issue of *The Roadrunner* newsletter includes a wrap up on the Annual Conference and Expo held in San Diego last month. The IMA provides opportunities for members to develop technical and professional skills in person and online. Make the most of your IMA membership by joining us for educational and networking opportunities.

## AZ Valley of the Sun Chapter President's Message

The IMA AZ Valley of the Sun Chapter is a chapter of the worldwide association of accountants and financial professionals working in business called the Institute of Management Accountants (IMA). We, like our global organization, are committed to helping you – and our more than 500 members (80,000 members globally) – to expand your professional skills, better manage your organization, and enhance your career.

Founded in 1964 and 1969 respectively, the Phoenix and Scottsdale chapters merged in 2002 into the current AZ Valley of the Sun chapter. Our global organization, with more than 90 years serving the financial management and accounting profession, was founded in Buffalo, NY in 1919 as the National Association of Cost Accountants (NACA). The name was later changed to the National Association of Accountants (NAA) and in 1991, the organization name was again changed to the Institute of Management Accountants (IMA), signifying the broader role as the association for accountants and financial professionals working inside organizations. Today, our global association is known by the shorthand – IMA. Like our global organization, our chapter vision is to be the leading resource for developing, certifying, connecting, and supporting the world's best accountants and financial professions in business.

IMA's mission is to provide a forum for research, practice development, education, knowledge sharing, and the advocacy of the highest ethical and best business practices in management accounting and finance. They do this by: Offering a rigorous, highly respected credential – the CMA – that recognizes and rewards expertise; Building a peer network of professional relationships to share industry experience, access career opportunities, and make business contacts to last a lifetime; Providing extensive education programs to advance professional knowledge, increase leadership potential, and satisfy CPE requirements; Giving a voice to the profession with insightful and timely journals and newsletters; Promoting leading-edge research and industry best practices; Advocating for the profession in a challenging regulatory environment. IMA currently represents more than 70,000 accountants and financial professional in business. The participation of each of our members makes the success of our mission possible.

I am truly excited about the opportunity to serve as our IMA Chapter President for the 2019-2020 year. Kendall did an awesome job last year, and I hope to continue on with her great legacy. I'd like to take a moment to highlight some of my higher-level goals for the 2019-2020 year: Bring "unaffiliated" IMA members in the Phoenix area to our IMA Valley of the Sun Chapter. I was an "unaffiliated" member for over five years. Most of that time, I didn't even know we had chapters. Once I learned about the chapters, it took me a while to learn about our chapter. When I finally joined our local chapter, it made a great difference in my life both professionally and socially.

Increase student involvement and have our students become full-time members upon graduation. The students are our future and bring new and diverse ideas. Bring more two hour credit opportunities to our NetTech Sessions. We all live busy lives, and it works great to be able to knock out two hours of our certification credits whenever possible. Increase attendance at our monthly NetTech Sessions. Not only are the sessions educational, they can be a great time to meet new people. Two of my favorites were Goodwill and the Super Bowl Committee.

I would like to leave you with the IMA Mission Statement: "IMA's mission is to provide a forum for research, practice development, education, knowledge sharing, and advocacy of the highest ethical and best business practices in management accounting and finance."

Please join us as we continue to develop today's accounting and financial professionals that make a difference in Greater Phoenix and beyond!

I look forward to serving you,

Brian Haberlin

Chapter President 2019-20

## 2019 Conference Highlights



Congratulations to the UNLV team!



Great view from the Sheraton San Diego Hotel



Panel discussion on the future of accounting



Jay Leno kicked off the conference with humor!

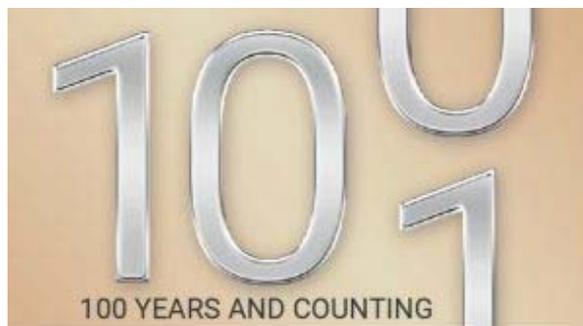


Networking and celebrations at the 100th Anniversary Conference!

## 100 Years and Counting

Dear IMA Community:

This is an exciting moment to be part of the IMA family, as we celebrate 100 years of service to our members and to the profession. We'll be commemorating our dynamic history throughout the year, culminating in a spectacular centennial celebration at our 2019 Annual Conference & Expo, with input from IMA's 100th Year Anniversary Committee, in San Diego next June. I look forward to seeing you there!



Founded in 1919 in Buffalo, New York, IMA – originally named the National Association of Cost Accountants – was created to acquire and share the most up-to-date accounting information among its original 97 members. IMA's founder, Major J. Lee Nicholson, said at the time that he was "optimistic this organization is going to become one of the largest and most successful organizations of this kind in the country." One hundred years and more than 100,000 members later, he would be proud to learn IMA is now one of the leading accounting associations in the world.

When I reflect on how far we've come, it's clear that IMA's longevity and strength come from continuously innovating new programs and services that benefit members. The creation of the CMA® (Certified Management Accountant) certification, the world's leading management accounting credential, is an obvious example, but IMA's advancements extend across the areas of research, education, career development, ethics, and leadership. It's inspiring that many of these innovations are owed to the engagement and expertise of our vibrant IMA community.

The world around us may be changing rapidly, but IMA is already leading management accounting into the next 100 years. How? By meeting the era of digital disruption head on. Our latest research is focused on future-proofing the profession and its professionals. To support this effort, we're evolving our Management Accounting Competency Framework to reflect changes in the profession and the skills necessary to thrive in a world of technological advancement. The world around us may be changing rapidly, but IMA is already leading management accounting into the next 100 years.

While looking forward with confidence, we're also giving back by increasing our investment in students – the future of IMA and the profession. In honor of our 100th Anniversary, we've established the IMA Century Student Scholarship Fund. Please join your fellow IMA members in providing critical financial support to motivated students who need assistance. Your tax-deductible donations make a profound difference in the lives of young people starting their professional journeys. In turn, they will become the next generation of leaders and continue our rich tradition of helping others. We have much to celebrate over the next year. Please help tell the IMA story by sharing your memories on social media using #IMA100Years. Thank you for helping make IMA the influential association it is today – here's to 100 years and counting!

Jeff Thomson, CMA, CSCA, CAE  
IMA President and CEO

## 2020 IMA Annual Conference & Exhibition



Don't just attend ACE2020 - Be a part of it!

IMA is seeking proposals for presentations and educational programs for ACE2020 to be held June 20-24, 2020 at the Atlanta Marriott Marquis, GA. Conference sessions are 75 minutes and include 10-15 minutes for questions and answers (pre-conference workshops are 135 minutes).

Primary speaker benefits include:

A complimentary conference registration

A \$500 stipend to defray travel expenses

A one-night stay (room and tax only) at the Atlanta Marriott Marquis

Please submit a proposal online by Friday August 30, 2019. The online call for sessions form and the list of tracks will be available mid-July at [imaconference.org](http://imaconference.org).

Registration for ACE2020 will open in February 2020

## Summer Relief Water Drive

As temperatures rise this time of year, what better way to give back than water!

The Arizona Valley of the Sun IMA Chapter will be collecting water bottles at the July NetTech Session held at the Hilton Phoenix Airport at 5:30 pm. The cases of water will be donated to the Salvation Army of Phoenix and distributed to those in need throughout the Valley.

If you would like to donate, please bring your bottles or cash donation to the July 16th session.

If you have any questions, please call Rich Leonard at 602-317-1150.

Thank you for your support!!!!



## IMA Century Student Scholarship Fund

As we celebrate IMA's centennial anniversary, we look forward to the next 100 years of the management accounting profession. By donating, you are supporting students in their pursuit of their college degrees and future career aspirations.

Visit the [IMA online store](#) to contribute to the special scholarship fund.



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Accountants and  
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in Business

Donation Amount:

\$25

\$50

\$100

\$250

\$500

Other, please specify

\$

## AZ Valley of the Sun Members Enjoyed San Diego



## IMA AZ Valley of the Sun Chapter

### Net Tech Session

### July 16, 2019

**Date:** Tuesday, July 16, 2019

**Time:** Networking 5:30 - 6:00 / Dinner 6:00 - 6:30 / Session 6:30pm - 7:30pm

**Session:** Financial Planning and Analysis with Creative Curiosity

**Session Description & Learning Objectives:**

Stephen will focus on Creative Curiosity with Financial Planning and Analysis, providing an overview of certifications- FP&A professional designation (certificate) VS IMA's CSCA Certificate. Followed by a discussion on the genesis of the rise of the FP&A focus & awareness? (CMA's have always focused on analytics) -So why now? So how does this relate to KPI's, CSF's and the elusive "Dashboards"? Where do we start? Add Curiosity to this and you have a very interesting talk! Attendees will learn Financial Planning in today's world with the new tools; Overview of Financial Planning certifications; Innovation with Financial planning

**Speaker:** Stephen Mason, CMA

**Field of Study:** Personal Development

**CPE Hours:** 1 hour

**Location:** Phoenix Airport Hilton Hotel 2435 S 47th Street Phoenix

**Menu:** Honey Ginger Grilled Salmon served with Roasted Potatoes & Seasonal Vegetables

**Cost:** \$31.50 member / \$35 nonmember / \$7 student

Visit our chapter website for session details and registration at [azvots.imanet.org](http://azvots.imanet.org)

**Final meeting registrations are due by Thursday before the meeting—please RSVP early!**

### Save the Date - Upcoming Net-Tech Session Topics

Aug 20th - FASB Update

Sep 17th - Student Night

Oct 15th - R&D Tax Credits

Nov 12th - AZ Treasurer's Office Tour & Update

Dec 10th - Starting a Business

## IMA Inside Talk Webinar

### Becoming a Data Driven Finance Leader

#### July 24, 2019

**Presenters:** Irina Lewis - Director of Industry Insights Sage Intacct, Jack Sweeney - CFO Thoughtleader Podcast Founder; Ben Luety—CFO Seattle Indian Health Board

**Event Description** Do you spend 50-75% of your time hunting down answers to backward-looking questions? You're not alone. As a Finance leader today, you need to be forward-looking, strategic, data-driven, and have a creative mindset. Join Irina Lewis, of Sage Intacct, Jack Sweeney, of CFO Thought Leader, and Ben Luety, of the Seattle Indian Health Board, as they discuss how to use a focused, deliberate, and coordinated approach of people, process, and technology to successfully transition from Finance 1.0 to Finance 2.0. They will describe how to position yourself to guide your team, organization, customers, and even career to improved performance and achievement.

**Learning Objectives** After this webinar, you will be able to:

- Recognize the approach and technology needed to succeed in today's digital, data-driven world. .
- Explain how to move from Finance 1.0 to Finance 2.0 and beyond.
- Discuss why and how to "Twitterize" your reporting for analytics.
- Give examples of how CFOs are using data-driven strategies to succeed.

CPE Credit: 1 hour

Field of Study: Management Services

Research Area: Strategy Planning & Performance

Program Level: Overview

Prerequisite: None

Advanced Preparation: None

Instruction Method: Group Internet

Visit the IMA Global Website [www.imanet.org](http://www.imanet.org) for more webinars and registration.



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in Business

AZ VALLEY OF THE SUN CHAPTER

# IMA VALLEY OF THE SUN FALL SOCIAL

## AT CHASE FIELD



Join the IMA AZ Valley of the Sun Chapter on Friday, September 27 for networking at our "Fall Social - D-backs Game" to watch the D-backs take on the Padres!

Tickets are in the lower level outfield bleacher area. Networking at Game Seven Grill (meet in patio area), next to entrance into the ballpark.

Networking Event: 4:45PM - 6:15PM  
First Pitch - 6:40PM

Invite your families and friends!

Seats: \$20 - Lower Level Outfield Bleachers

FRIDAY  
**SEPT 27**  
6:40PM

ARIZONA  
**DIAMONDBACKS**  
VS  
SAN DIEGO  
**PADRES**

FOR TICKETS, LOG ONTO:  
[AZVOTS.IMANET.ORG/HOME](http://AZVOTS.IMANET.ORG/HOME)

FOR QUESTIONS, PLEASE CONTACT TRAVIS MAGNESON AT [AZVOTS.IMANET@GMAIL.COM](mailto:AZVOTS.IMANET@GMAIL.COM) OR 602.689.9478

[dbacks.com](http://dbacks.com) 602.462.4600

CHASE FIELD // 401 EAST JEFFERSON STREET // PHOENIX, ARIZONA

The logo for the Certified Management Accountant (CMA) certification, featuring the letters "CMA" in a bold, serif font with a registered trademark symbol.

*IMA's Certification for  
Accountants and  
Financial Professionals  
in Business*

## CMA Scholarship Program

CMA® (Certified Management Accountant) is the gold standard of certification in management accounting. It is unique among professional and academic credentials, designed specifically for accounting and financial management professionals in business. Achieving the CMA designation demonstrates professional expertise in financial planning, analysis, control, decision support, and professional ethics – essential skills sought after by successful organizations and their financial team leaders.

IMA® (Institute of Management Accountants) is committed to supporting the education of future accounting and finance professionals working in business. As part of this effort, IMA has instituted the CMA Scholarship Program which honors top students by recognizing them with this scholarship.

Recipients of the CMA Scholarships will receive a comprehensive package of benefits enabling them to study for and take the CMA exam at no cost. The benefits include:

- IMA membership for up to 3 years while pursuing completion of the CMA exam
- Entrance fee to the CMA program
- Exam Support Package – an assessment tool that can help assess the content covered on the CMA exam
- Registration fees for the first attempt at both parts of the CMA exam
- Wiley CMAexcel test bank access for up to 2 years for both CMA exam parts (U.S. students only)

The CMA Scholarship is activated at the time a nominee joins IMA and registers for the CMA Program. The scholarship recipient has up to 3 years to successfully complete both parts of the CMA exam.

Faculty can nominate up to 10 students per university per academic year. Students must be currently enrolled full-time in a bachelor's or master's program to be nominated. Students that have already graduated would not qualify for the CMA Scholarship. Students cannot self-nominate.

For more information and application, visit [www.imanet.org/cma-certification/cma-scholarship](http://www.imanet.org/cma-certification/cma-scholarship).

# PASS THE CMA EXAM!

## **GLEIM** CMA<sup>®</sup> REVIEW SYSTEM

**IMA Chapter members  
receive significant discounts on  
CMA and CPE purchases!**



### System includes:

- Personal Counselor
- Gleim Online
- Test Prep Software
- Test Prep for Windows Mobile
- Essay Wizard
- Audio Cds
- Books
- 18-mo. Product Replacement

Contact Melissa Leonard at:  
**800.874.5346 Ext. 131**  
**melissa.leonard@gleim.com**  
**gleim.com**

***SUCCESS GUARANTEED!!***



## Strategic Finance: Reflections of Gratitude

2018-2019 IMA Global Chair Ginger White shared her experiences over last year in the June issue of Strategic Finance.

Looking back over the past year, I want to say thank you to the IMA® staff, the IMA Global Board of Directors, and local IMA leaders who arranged and worked on various events throughout my term. Some of my special memories include delivering the ethics case to members and nonmembers in the Louisville Chapter area with Lisa Book, Global Board member, former Louisville Chapter president, and Lincoln Trail Regional Council president. I also enjoyed delivering that same ethics case to the Golden West Council with long-time IMA Global Board friends Sandy Giberson and Dave DiMare.

On the student and academic side of things, I had the opportunity to deliver a presentation to Eastern Kentucky University students regarding the benefits of IMA and the CMA® certification. The night before that on the ECU campus, I presented on the topic of "The Future of Accounting" to the professional community, accounting faculty, and students in Richmond, Ky. At ECU, I also met with student chapter leaders and the students of Patricia Isaacs, who was my accounting professor at Berea College when I attended college there. Another highlight was sharing the value of IMA and the CMA with students at Berea College and visiting with Ed McCormack, chair of the Economics and Business Department and my spreadsheets and database professor when I was a student.

I also count among the highlights of my term meeting members and other professional leaders from the Middle East and India during the Women's Accounting Leadership Series events held there. Learning that the women in these regions share similar challenges to those in the United States was enlightening. I also appreciated hearing from the women who had progressed to the C-suite and prominent roles in these regions because it was refreshing to see them openly share how they had navigated to break down traditional barriers.

Thank you for allowing me to serve as your Chair for the 2018-2019 fiscal year. Thank all of you who have dedicated your time and talents to make this yet another exceptional growth year in both CMAs and CMA candidates. I look forward to serving as Chair-Emeritus, and I couldn't be more comfortable in turning over the Chair role to Christian Cuzick. I know Christian will do a phenomenal job, and I will participate under his leadership in any way I can to further the value each of our members receives from IMA.

Read more articles at [sfmagazine.com](http://sfmagazine.com).



## Upcoming Chapter Event

July 16th

Financial Planning & Analysis

Hilton Phoenix Airport Hotel

Aug 20th

FASB Update

Hilton Phoenix Airport Hotel

Sep 17th

Career Night

Hilton Phoenix Airport Hotel

Oct 15th

R&D Tax Credits

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Nov 12th

AZ Treasury Office Tour & Update

Hilton Phoenix Airport Hotel

Dec 10th

Starting a Business

Hilton Phoenix Airport Hotel

### Vision Statement

Our vision is to be the resource for developing, certifying, connecting, and supporting the world's best accountants and financial professionals within business.

AZ Valley of the Sun Chapter

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The Association of Accountants and Financial Professionals in Business

### Mission Statement

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## JULY 2019

**Reminders:**

- Take advantage of free CPE, sign up for the monthly IMA webinars.
- Bring donations of bottled water to the July 16th Net-Tech Session
- Sign up for the September CMA Review Course
- Save the Date for the Fall Social—AZ Dbacks on September 27th

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17 Webinar	18	19	20
		Net-Tech Session				
21	22	23	24 Webinar	25	26	27
28	29	30	31			