



AZ Valley  
of the Sun  
Chapter

# The Roadrunner

December 2015

Volume 17, Issue 7

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## IMA Online Courses - Strategy

Let the IMA help you transition from accounting staff to a strategic business partner. In addition to local education and networking, IMA Global has resources and tools for members. Take advantage of the free webinars and subscription courses available to IMA members.

### [FP&A Series: Strategic Planning](#)

In this intermediate level course, learners will discover how management accountants can contribute to the strategic planning process and drive performance in their organizations. Earn 2.5 NASBA CPE. This product will be valid for six months from purchase date. Member Price \$115



### [FP&A Series: Strategic Budgeting](#)

Learners of this intermediate level course will understand the use of a variety of budgeting techniques that will align their operational budget to strategic initiatives within their organization. Earn 2 NASBA CPE. This product will be valid for one year from purchase date. Member Price \$95



Visit [www.imaonlinestore.com](http://www.imaonlinestore.com) for more online courses for meeting your annual continuing education requirements and helping you gain the skills and knowledge to make the next step in your career.

The December issue of *The Roadrunner* newsletter focuses on Strategy. As management accountants transition into strategic partners for their organizations, they need to add more strategic skills to their professional toolset. Take advantage of your IMA membership and join us for any of our educational, career and networking events to further develop your softer skills.

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

Dear IMA AZ Valley of the Sun Chapter Members,

Strategy is different from vision, mission, goals, priorities, and plans. It is the result of choices people make, on where to target their efforts and how to achieve the best results, to maximize long-term value. To define the fundamentals of your strategy, you need only to answer three questions:

1. Who is the target customer?
2. What is the value proposition to that customer?
3. What are the essential capabilities needed to deliver that value proposition?

You have to have answers to these three questions. Otherwise you may have an exciting vision, a compelling mission, clear goals, and an ambitious strategic plan with many actions under way, but you won't have a strategy. Having a differentiated approach to a target market can be a source of great advantage.

The IMA is a global organization targeting accounting and financial professionals in business. Why do thousands of accounting and financial professionals invest in IMA membership? In a word: value. IMA is a one-stop source for professional development and career enhancement—giving you access to the tools, information, and peer networks you need to drive your professional potential. IMA's comprehensive services and benefits are specifically tailored to the needs of accountants and financial professionals in business. At all levels of the profession—from C-level executives to young professionals to students and academics—the IMA offers valuable resources to enhance your career and power your business potential.

Some of the key differentiators of the IMA include:

1. *LinkUp IMA*, a proprietary online community for accountants and financial professionals, enables members to join groups based on common interests. The IMA has more than 300 local chapters around the world, including a broad network of student chapters for tomorrow's professionals.
2. IMA publications deliver timely, actionable information to help members do their jobs more effectively, advance their careers, and make their organizations more successful including *Strategic Finance*, *Management Accounting Quarterly*, *IMA Educational Case Journal*, and E-newsletters. These publications offer IMA members the opportunity for thought leadership.
3. Certified Management Accountant certification, CMAs enjoy greater career and earning potential. Around the world, CMAs earn at least one-third more in total compensation compared to their noncertified peers.
4. Research and Information, exclusively for members, our Statements on Management Accounting are practitioner guides covering trends and best practices on a variety of management accounting topics.
5. CareerDriver™ – Assess your skills, plan your path, and see your future.

Sincerely,

Travis J. Magneson, CPA CMA CFM

IMA AZ Valley of the Sun Chapter

2015-2016 President

## The Evolving Role of Finance: From Spreadsheets to Strategy

As I [often remark](#), CFOs and other senior finance professionals are transitioning from “bean counters” to “bean sprouters,” as we play a greater role in our organizations’ strategy. According to a [report](#) recently released by BlackLine and Middle Market Executive, CFOs at mid-market companies are experiencing a similar transformation. I spoke with Therese Tucker, CEO and founder of cloud-based finance controls and automation software provider BlackLine about the evolving role of finance and how technology has paved the way. *This interview has been edited and condensed.*

**Jeff Thomson:** BlackLine recently released a report on finance executives at middle-market firms. What is the report’s biggest takeaway for CFOs?

**Therese Tucker:** Finance is evolving. Like their counterparts at large organizations, middle-market CFOs are fully leveraging technology across key finance and accounting processes to support their enterprise performance management agenda. They are improving the control and visibility of data while giving their teams the opportunity to focus their energy on enhancing business intelligence, developing more accurate forecasts, and tightening internal controls to assure accurate financial reporting and proper compliance. And, thanks to cloud-based solutions, they are able to implement these technologies despite limited IT and financial resources.

In short, the modern finance movement is increasingly becoming a competitive differentiator.

**Thomson:** Can you expound on the ways technology, and specifically automation, has impacted the transformation of the finance function?

**Tucker:** Our survey found that more than 25 percent of respondents said their finance teams spend more than half of their total time each year collecting, entering and validating data, with an additional 35 percent saying their teams spend between a quarter and half of their total time on these tasks. That’s pretty unbelievable when you think about all of the well-paid, college-educated employees who are devoting much of their day doing rote, manual tasks. I’m sure that wasn’t their dream when they decided to become accountants.

Automating these manual processes has huge implications for the finance function. First, there is greater control and visibility of the data with reduced compliance risk since employees are no longer using multi-line spreadsheets to complete their duties. But most of all, automating these processes will transform the finance function by freeing finance professionals from the enormous amount of time they spend collecting and verifying data, giving them the opportunity to redirect their efforts toward analyzing the data and being much more productive, strategic employees. I suspect they will be much happier employees as well.

Visit the IMA News and Media Relations at [www.imanet.org/about-ima/news-media-relations](http://www.imanet.org/about-ima/news-media-relations) for more articles by Jeff Thomson focusing on IMA and management accounting.

## Future Pathways to Finance Leadership

A global study undertaken jointly by ACCA and IMA provides insights from today's finance leaders on how they see the role of the CFO evolving.

Future CFOs will follow an evolving career path, rebalances between the traditional stewardship role to value catalyst. It will play out in many ways; the need for future CFOs to develop much broader leadership capabilities beyond traditional finance strengths; the requirement for deeper business and sector specific experience and knowledge; the capacity to lead major transformation and change projects cross-functionally; skills in working effectively across different cultures and international environments; finely honed communication and influencing capabilities which enable finance chiefs to put across the right messages to very different internal and external stakeholders groups, and so on.

These evolving capabilities are not simply needed by chance. They are, of course, a direct response to how the business environment is changing, and as a consequence reflect the changing expectations the business and the wider market has of the CFO and the finance teams they lead; a rebalancing global economy where businesses operate across both mature low-growth western markets and faster growing emerging markets; the changing face of the finance organisation with increasing use of shared services and business service constructs and a more focused retained finance operation wired to 'add value' or to provide deep specialist finance advice in an increasingly complex regulated environment; the proliferation of risk, with wider regulatory challenges and greater scrutiny on organisation performance; a more competitive environment, fuelled by the growth of consumer power in an age of increasing brand disloyalty and lower switching costs; and of course the defining influence of our age – the proliferation of information and data, and the advent of social, mobile and cloud technologies that will revolutionise how and where we do business.

In the face of all of these developments, this report simply asks what the implication is for how aspirant CFOs should plan out their own careers to successfully lead the finance function of the future. It reflects the view and perspectives of current CFOs on the skills and capabilities that will be of most value for future finance chiefs.

This is their advice:

1. Plan A - know your finance fundamentals
2. See strategy and business experience as the new baseline
3. Career plan for the next big thing in finance: Insight and Analytics
4. Get risk experience under the belt
5. Become a deal maker
6. Get closer to stakeholders, become customer-focused
7. Focus on the management skills that matter
8. Prepare for more regulation and broader reporting
9. Get connected
10. Expand your 'footprint'

For the full article on the ACCA and IMA joint study, visit <http://www.futuretoday.com/business/talent/future-pathways-to-finance-leadership.html>.

## Community Service Projects

### Christmas Angels - Worldly Kids

Members can support our latest community service project by selecting a Christmas Angel recipient at the November 10th meeting and bringing back a present to the December 8th meeting.

WORLDLY KIDS, INC., ("WK") a newly formed Arizona non-profit organization, was launched to serve the needs of a unique student population who is homeless and/or underserved. For most homeless children of today, homelessness is not a brief experience in their life, but a period of time that is fraught with educational and emotional setbacks that may last for years to come. In contrast, children living in normal homes and taught in traditional schools are given daily opportunities that help to create a positive growth environment, assuring health, happiness and wellness. For the success of these underserved children who struggle on a daily basis, for their basic needs, WK's goal is to address those obstacles that impede their learning, so they may receive the education needed to become healthy, happy and independent, adults. These children deserve more positive opportunities in their life.



Learn more about this nonprofit organization and volunteer opportunities at [www.worldlykids.org](http://www.worldlykids.org)

### Waste Management Open - February 6th

Volunteers needed for the Waste Management Phoenix Open!

On Saturday, February 6, 2016, IMAAZ will be helping the Special Olympics by staffing one of their concession stands at the Waste Management Phoenix Open! Our shift we run from 7:30 AM to 2:00 PM, and we will need at least 25 volunteers. Special Olympics get a donation for each Volunteer. Make yourself count by volunteering! This is our sixth year participating in this event, and it has always been a fun and very busy time at the open!



All volunteers receive a free day pass for the Open. To sign up, contact IMA Community Service Director Chris Fritsch at [cpinnacle@cox.net](mailto:cpinnacle@cox.net). Thank you for your support of our community!



## IMA Inside Talk Webinar Gaining Strategic Advantage through the Cloud December 8, 2015

**Presenters:** Mark L Frigo, PhD, CMA, CPA – Director, Center for Strategy Execution and Valuation DePaul University  
Steve Van Houten - Chief Financial Officer, Rancon Group  
Larry Simcox – Senior Director, Oracle  
Angela Neria – Chief Information Officer, Office of Information Services Pittsburgh State University

**Event Description:** Learn how adopting “Modern Best Practice for Finance” delivers greater business value to growing companies. Mobile, analytics, cloud, Big Data, and the Internet of Things are having a profound impact on how companies perform their strategic financial planning process, manage their cash position, approve budgets, pay suppliers, and close their books in a timely manner to create actionable reports and accurate forecasts. Also, hear about two growing companies that are adopting “Modern Best Practice for Finance” and gain insight into their strategy and execution in the cloud.

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

1. Leverage the Cloud as a strategic asset for your corporation or business.
2. Explain how to adopt mobile strategies to efficiently and effectively run a business.
3. Incorporate the Return- Driven Strategy framework into your strategic decision-making processes.
4. Understand how you can leverage advanced analytics to unlock business value.

**Price:** Free

**CPE Credit:** 1 Credit

**Field of Study:** Management Advisory Services

**Research Area:** Technology Enablement

**Program Level:** Overview

**Prerequisites:** None

**Advance Preparation:** None

**Instructional Method:** Group-Internet

Institute of Management Accountants (IMA) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website [www.learningmarket.org](http://www.learningmarket.org).

Visit [http://www.imanet.org/programs\\_events/IMAWebinars](http://www.imanet.org/programs_events/IMAWebinars) to register for webinars.



The Association of  
Accountants and  
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## Women's Accounting Leadership Series

Mark your calendars for **Friday, April 29, 2016** for an innovative, inspiring, and informative event, presented by IMA, Pace University, and Arizona State University.

**WHAT:** The Women's Accounting Leadership Series is designed to provide relevant professional development and support for the advancement of women in accounting and finance functions in corporate America. Participants will include accomplished female leaders in the profession, as well as aspiring and mid-career accounting professionals, so that different perspectives on challenges and potential solutions are shared in an interactive dialogue.

**WHEN:** Friday, April 29

**WHERE:** Arizona State University  
WP Carey School of Business, McCord Hall  
Tempe, Arizona

**WHO:**



**Sandra B. Richtermeyer,**  
Ph.D., CMA, CPA  
Professor of Accountancy and  
Associate Dean  
Williams College of Business  
Xavier University  
Former IMA Chair  
IMA Global Board of Directors



**Leslie F. Seidman**  
Executive Director  
Center for Excellence in  
Financial Reporting  
Lubin School of Business  
Pace University  
Former Chair of FASB

**Price:** Free

Earn NASBA-approved  
CPE credits

**Includes:** Breakfast,  
networking break, and  
informal lunch

**REGISTRATION:**

Details to follow in a  
subsequent e-mail.

## IMA Wild West Council 2015-2016 Board

President	Diane Hewlett
President-Elect	OPEN
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Global Director	Nancy McCleary
Treasurer	Deb Michalowski
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V.P. Chapter Relations	Pem Smith
Director-Webmaster	Frank Garcia
Director-Newsletter	Nancy McCleary
Director-LinkedIn/LinkUP	Pam Zanzucchi
Directors – Meetings:	Kelly Benner Camille Cook Patrick Wilson
Directors – Education	Celeste Porter Derek Heijmans
Chapter Mentors	Lyle Braithwaite Rob Ferrell Frank Garcia

### Get Social with the IMA Wild West Council



[www.facebook.com/  
imawildwestcouncil](http://www.facebook.com/imawildwestcouncil)

[@IMAWWC](https://twitter.com/IMAWWC)

## IMA Wild West Council 2015-2016 Meeting Calendar

February 19-20, 2016 Phoenix

April 22-23, 2016 Salt Lake City

Join us for the IMA Wild West Council events in Phoenix!

### Friday, February 19, 2016

11:30 AM - 12:30 PM - CMA Rally (tentative) - Free!

Join us for an informational event about the Certified Management Accountant Certification, Accounting Careers in Industry, and Networking

1:00 PM - 5:00 PM - 4 hours of CPE

1:00 PM - 3:00 PM. Former IMA Chair, Bud Kulesza - Ethical Leadership: A Values Based Approach (2 hours)

3:00 PM - 5:00 PM Additional topic to be announced

Location: Sheraton Downtown Phoenix Hotel

6:30 PM - 8:00 PM (tentative) - IMA Global Board Networking Reception - Wild West Council members welcome

### Saturday, February 20, 2016

9:00 AM - 12:00 PM - Wild West Council Meeting -

All IMA members welcome!

Location: CBIZ Office

3101 N. Central Ave., Suite 300

Phoenix, AZ 85012

12:00 - 4:30 Lunch and Social/Networking Event

Phoenix Art Museum - we will take the Light Rail to the museum and back to the hotel

6:00 Group Dinner TBD

Visit the IMA Wild West Council for event details, registration and payment <https://sites.google.com/site/wildwestcouncil/events-1>

## December Technical Session

### Spouses Night

**Date:** Tuesday, December 8, 2015

**Time:** Networking: 5:00pm - 6:00pm / Dinner: 6:00pm - 7:00pm / Session: 7:00pm - 8:00pm

**Session:** Time Management

**Speaker:** Nicole Bandes, The Productivity Expert

**Description:** Nicole will help us to overcome lack of focus, too much procrastination & lack of time to get things done. She will teach us how to reach our goals faster & easier so that we get control of our schedules & lives. We will learn how to do what matters!

**Amount of CPE:** 1 hour

**Menu:** Chicken Marsala Plated Dinner

**Cost Both Sessions:** Members \$37, Non Members \$42, Students \$5

**RSVP Due:** Thursday December 2, 2015

Register online at [www.imavalleyofthesun.org](http://www.imavalleyofthesun.org) and use our credit card payment option.

#### Speaker Biography - Nicole Bandes

Known as "THE Productivity Expert", Nicole Bandes is intensely committed to helping overwhelmed business leaders transform their businesses and lives. Nicole has spent over 20 years studying productivity and time management only to find that most systems fall short. Fortunately, she discovered the secret formula and began teaching her methods to others while living a healthy, "balanced" life before her life was changed forever.



## Phoenix Heart Walk

Saturday, March 19, 2016 | Cityscape Downtown Phoenix

Join thousands of walkers from the Greater Phoenix area as they step out to have fun, get inspired, & support a meaningful cause! The Heart Walk is a 3 mile route and the Stroke Walk is a 1 mile route. **Participants are allowed to bring strollers, rollerblades, etc., but please be mindful of the large crowds, especially at the Start Line. Dogs are welcome and, by City of Phoenix law, must be on leash and cleaned up after.** We look forward to seeing you downtown!

### Event Information

Date: Saturday, March 19, 2016  
Location: Cityscape Downtown Phoenix 145 E Washington St. Phoenix, AZ 85004  
Time: 8:00am to 12:00pm  
The Route: 3-mile Heart Walk and a 1-mile Stroke Walk

Join the **Number Crunchers Team** for the 2016 Phoenix Heart Walk! Together we can take a step toward improving our heart health while having fun! Members of the **Accounting & Financial Women's Alliance** and the **Institute of Management Accountants**, along with friends and family will participate in both the 3 mile and 1 mile walks. No matter your fitness level, there is an opportunity to participate in the walk and the festivities. Please visit <http://phoenixheartwalk.kintera.org/numbercrunchers> to join or support the Number Crunchers Team!

Questions: Contact Team Captain Laura Mangan at 480-276-5926 or [lauralynne@earthlink.net](mailto:lauralynne@earthlink.net).



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### Fulfill your CPE requirements before 2015 is over!

I'd like to take this opportunity to remind all CMAs that you have until **December 31, 2015**, to meet your annual 30-credit continuing professional education (CPE) requirement, including two hours of ethics training.

IMA offers an extensive continuing education course catalog to help you stay current with the profession and meet your annual CPE requirements. These courses cover the latest topics in accounting and finance. Topics include risk management, forecasting, strategic planning, and ethics. Our convenient courses are available to you online, anytime, anywhere. I also invite you to explore opportunities available through IMA local chapters and councils, IMA conferences, and live webinars.

Ethics remains an important subject at IMA, and we're continually updating our learning products in this area. Click [here](#) to learn more about our new ethics product, **Blinded by Pressure**.

**Purchase now** to take advantage of a 10% discount on our ethics courses as well as all of our **CPE products**. This exclusive offer is only good until December 31, 2015. Enter promo code **CPEENDJ2015** at checkout.

Today's business culture demands the highest standards in ethical and professional skills. I hope you continue to turn to IMA for the latest in continuing education and wish you all the best in your career development. If you need further assistance, please contact IMA Member Services at (800) 638-4427 or +1 (201) 573-9000 (for international callers) or e-mail at [ima@imanet.org](mailto:ima@imanet.org).

Sincerely,

A handwritten signature in cursive script that reads "Jeff Thomson".

Jeffrey C. Thomson, CMA, CAE  
IMA President and CEO

# PASS THE CMA EXAM!

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## IMA AZ Valley of the Sun Chapter 2015 - 2016 Board of Directors

President	Travis Magneson	VP Communications	Michael Feldman
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VP Administration	Trey Ballard	Asst Email Distribution	Diane Hewlett (P)
Treasurer	Ron Caron (P)	Newsletter	Laura Mangan
Assistant Treasurer	John Bakker	Publicity	Trey Ballard
Secretary	Kathleen Moren (P)	Webmaster	Deb Michalowski (P)
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Past President	Cheryl Brock (P)		
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Co-Director	Nick Stefaniak (P)	Corporate Development	Deb Michalowski (P)
Co-Director	Tom Dopler	Asst Corp Development	Mirza Alihodzic
Co-Director	Pam Zanzucchi (P)	Sponsorships	open
Co-Director	Deb Michalowski (P)	Employment	Mitchell Davidson
CMA Program	Julie Wilson	Employment	Christian Kaijser
Asst CMA Program	Mirza Alihodzic	Employment	Glenn Hines
Asst CMA Program	Andrew Rhea	Employment	Chris Stich
Education Reporting	Dawn Sandberg	Student Relations	Yaman Nass
Certificate Reporting	Laura Mangan	SCST Scholarship	Donna DeMilia
Webcaster	Kathleen Moren (P)	SCST ASU	Nick Stefaniak
Meetings/Attendance	John Bakker	SCST DeVry	Robert Norton
Raffle	Susan Bobbe	SCST GCU	Alex Ortiz Rosa
		SCST Internship	Yaman Nass

Please contact Travis Magneson if you are interested in serving on the chapter board, on a committee or volunteering for an event. Email Travis at [tmagneson@cbiz.com](mailto:tmagneson@cbiz.com). Members are welcome to join us at monthly board meetings. Check the events page for the date and location of board meetings.

## IMA AZ Valley of the Sun Chapter Member December Anniversaries

### 1-10 Years

Don Whitehead, CPA  
Janice Renae Holmes  
Melissa King  
Nicole M Koenes  
John J Castellaneta  
Brendan Gallagher, CPA  
Rand Martin Blunck II  
Yanxiang You  
Kaitlin Patterson  
Narasimha Babu Badri, CMA, ACMA  
Matthew Morris, CMA  
Nisso Akparovna Alimova, CMA  
Timothy Morris, CPA  
Matthew D Shelton, CMA  
Robert Roe, CMA  
Michael R Metzler, CMA  
Scott Crist  
Veronica Sas  
Pierre Bollert

### 11-20 Years

Yu Mei Lin  
Peter Harris, CMA, CPA  
Jeffrey Allen Egerstrom, CMA, CTP, CISA

### 21-30 Years

Robert Berger  
Ronnie Jett  
Richard Wamhoff, CMA  
Sean Wright, CMA, CPA  
Daria Pace

### 31-40 Years

W Jeffrey Stoddard  
Sandy Burton  
Stephen Peterson, CPA  
Michael Horwitz  
William Craig  
J G Speer  
Dorothy Hird

### 50+ Years

A J Hardy  
John E Horan, CMA

## Strategic Finance: Want to Teach College? Become an Adjunct

In the December 2015 issue of Strategic Finance, G. Richard French, CPA; Brenda Swartz; and Kenneth R. Taurman, Jr. share how accounting and finance professionals can give back by teaching future accountants. These professionals can help fill a need for accounting instructors with the shrinking PhD pool. The combination of aging faculty approaching retirement and increasing student enrollment will create a high demand for future teaching resources.

Schools are relying more on professionals to take part time teaching positions. This supply of qualified professionals is increasing as more professionals are completing advanced degrees. Like any job search, potential adjunct instructors can increase their chances by getting their foot in the door, demonstrating teaching qualities, and building professional qualifications.

Benefits of teaching include having a positive impact on students, rewarding professional activity, gain reputation as expert in your community, gain CPE credit, contribute to community and continue learning new concepts.

Your IMA membership can help you make the connections with faculty and provide tools and resources to share with students.

Visit [www.imanet.org](http://www.imanet.org) for IMA Publications and the new SFMagazine.com for the full article and the latest issue of *Strategic Finance*.



## Upcoming Chapter Events



December 1st

Board Meeting

Macayo's Phoenix

December 8th

Time Management - Spouses Night

Marriott Airport Hotel Phoenix

January 12th

Board Meeting

Macayo's Phoenix

January 19th

Federal & State Tax Updates

Marriott Airport Hotel Phoenix

January 22nd

Breakfast Meeting

Paradise Bakery Scottsdale

### Vision Statement

The world's leading association for management accounting and finance professionals.

AZ Valley of the Sun Chapter  
 P.O. Box 2771  
 Scottsdale, AZ 85257-2771  
  
[www.imavalleyofthesun.org](http://www.imavalleyofthesun.org)



The Association of  
 Accountants and  
 Financial Professionals  
 in Business

### Mission Statement

Provide to members personal and professional development opportunities through education, association with business professionals, and certification in management accounting and financial management skills. Ensure that IMA is universally recognized by the financial community as a respected institution influencing the concepts and ethical practices of management accounting and financial management skills.

## DECEMBER 2015

**Reminders:**

- Participate in the Christmas Angel Community Service Projects at the November and December meetings.
- Join the VITA training session on January 10th and help low income members of our community get tax credits.

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