

The Derby City Post



Louisville
Chapter

Mar. – Apr. 2017

Contents

President's Message	1
January Tax Seminar	2
Upcoming Events	2
Chapter Board of Directors	2
New Member Spotlight	3-4
CMA Study Group	4
Gleim Discounts	4
FREE Ethics Workshop	5
Upcoming IMA Webinars	6
New Member Spotlight	6
Call for Board Volunteers	7
IMA Milestones and Anniversaries	8
Spring Conference Flyer	9-10
Board Member Spotlight	11
Mr Excel Seminar Flyer	12
Gleim CMA Discount Form	13
CMA Program:	14-16
Destinations Delivered	
2017-18 Chair-Elect	16
Thank You: Sunrise Children's Services Donation	17-18
Louisville Chapter Scholarship Application	19-20

President's Letter



Dennis Harding, Jr.,
2016-17 President

We are now in the last few months of the fiscal year, and are finalizing plans for our annual Spring Conference in April, our last event of the year. We have a great group of speakers lined up for this event, including Greg Coker, who will present a half-day of his "Soft Skills Bootcamp" seminar. We hope to see many of you at this event and welcome you to bring or encourage other accounting and finance professionals to attend.

That brings us to our last and most important topic. The Louisville chapter of the IMA is a great chapter and has had much success over the years. Over the last few years, some of our longer-term board members have transitioned off of the board due to work and family responsibilities. Although we have a great group of board members that I serve with, it is becoming more difficult to find additional board volunteers to fill various open roles. The only way to have a great chapter is to have active members willing to participate and contribute to its success..

With this said, in order to continue as a chapter, we have to have a President, Secretary, Treasurer, and VP of Membership. These are mandatory positions. Over the years, we have traditionally had a President-Elect in the wings to take over. This has not been the case for the last two years and now with an even smaller board, it is becoming a challenge to find those that are willing or ready to step up. I am asking that our membership consider very strongly the option of being a part of the board in the coming year. With more people actively involved, we can be even more successful and also lessen the burden on individual board members. We are unfortunately at a point that if we do not get more volunteers, the Louisville chapter may cease.

President's Letter, continued on Page 2.



The Association of
Accountants and
Financial Professionals
in Business

<http://www.louisville.imanet.org/>

President's Letter, continued from Page 1.

That is the last thing that myself or any of the current board members want, but we need help to not only do some of the work but also to help bring in fresh ideas and perspectives. Please consider helping in continuing to make the Louisville chapter a great representation for our profession and the community. Please reach out to any of the current board if you have any questions or suggestions.

Dennis E. Harding Jr., 2016-2017
President
D_harding1969@yahoo.com

Save-the-Date

- **Mar. 11th & 18th** – “Blinded by Pressure” Ethics Workshop (2-CPE) online via WebEx - FREE (Page 5)
- **Apr. 21st** – Lincoln Trail Council MrExcel Seminar (8-CPE) in Indianapolis (Page 12)
- **Apr. 28th** – Spring Conference (8-CPE) at University of Louisville Shelby Campus (Page 9)

Up to 18 CPE in March-April!

January Tax Seminar

We kicked off 2017 with our Tax Update on January 20th at Indiana Wesleyan University, with speakers Mark Loyd, Bailey Roese, and Jeffrey Mahoney.



2016-2017 Louisville Chapter Board of Directors

Position	Name	Email
President	Dennis Harding	d_harding1969@yahoo.com
Vice President of Professional Education & Membership	Kevin Adams*	kadams@ksfb.ky.gov
Treasurer	Tim Wallen*	twallen@fitmoneycpa.com
Secretary	Rachel Mattingly	rmattingly071109@gmail.com
Director of Program/Roster	Kelly Segvich	ksegvich42206@gmail.com
Webmaster	Jennifer Taylor*/Darrell Taylor ...	jennifer_lynn_taylor@yahoo.com
Director of Community Relations	Lisa Book*	lmbook@ius.edu
Director of Meetings	Kristin Ayres	kristin.ayres@gmail.com
Mentor Coordinator	Ted Bordador	ted.bordador@parkerlynch.com
Director at Large	Jennifer Kline*	jenniferrkline@bellsouth.net

**Past President*

New Member Spotlight

Shane Finley – General Ledger Accountant at Sazerac Company, Inc.



I was born and raised in Louisville. I received my accounting degree from Lindsey Wilson College and played baseball there as well. I once tried out for the Cincinnati Reds, but came up short in the final cut. It was not the result I was wanting but glad to

be able to follow a dream I had since I was a kid. I am a huge Green Bay Packer and Chicago Cubs fan.

Why I joined the IMA: a mentor suggested I join to help me grow and meet other professionals in the industry.

Bryan Hellmann – Senior Accountant at SGS



I am currently pursuing the CMA certification, recently passing Part One: Financial Reporting, Planning, Performance and Control. I recently accepted a position as a Senior Accountant for SGS in Louisville but I have also worked as an accountant for a

local CPA firm and as a management accountant at another company. I firmly believe in personal and professional development and constantly strive to improve my knowledge, skills and abilities. I joined the IMA not only to pursue the CMA certificate but to grow my network by meeting other management accountants in the Louisville area. Outside of my career, I enjoy spending my free time with my family and keeping up with UofL sports.

Nate (Nathaniel) Littles – Staff Accountant at DMLO CPA's



I am a Bellarmine University graduate, currently working as a Staff Accountant with DMLO CPA's. I am working on obtaining CPA certification, and then going to pursue CMA certification. I am a Louisville Cardinals fan, but my wife is a Kentucky Wildcats fan...so we have a divided household!

Why I joined the IMA: to meet other professionals, to get more information about the CMA certification, and also to diversify myself in the marketplace.

You may recall that Nate was previously recognized in our November/December 2016 newsletter as Bellarmine University's Outstanding Accounting Student for Louisville IMA Chapter for 2015-16. Congrats again, Nate!

Welcome New Members

Nicole Hall	(Student) University of Pikeville	1/30/2017
James Followell	(Director/Manager) Rainbow Blossom, Inc.	1/31/2017
Hope Randolph	(Student) Bellarmine University	1/27/2017
Mary Yvonne Howard	(Student) University of Louisville	1/29/2017
Sidney Capelle	(Student) IU Southeast	2/8/2017
Clayton Brown	(Student)	2/19/2017
Anna Atkisson	(Student) IU Southeast	2/20/2017
Deacon P Bramlett	(Controller)	2/21/2017
Shawn M Bullock	(Senior Manager) A. Darnell & Company, Inc.	2/23/2017

Interested in a CMA Study Group?

For those sitting for the CMA exam, the idea of studying on your own can be intimidating. Please contact Director of Community Relations, Lisa Book, at lmbook@ius.edu if you are interested in joining a study group. The Louisville Board will get you in touch with other members sitting for the exam. This would be a great way to compare study techniques, have an incentive to stay on schedule, and find out tips for successfully completing the exam.



Working together, individuals in study groups can generally learn faster than those working alone. For instance, some part of the review material that seems completely confusing to you could be quite clear to someone else. In a study group, instead of spending valuable time puzzling over the difficulty, you can learn quickly by simply asking a question.



The Louisville IMA Chapter has partnered with Gleim to help ensure your success on the CMA exam!

The Gleim CMA Review has the largest exam-emulating test bank of multiple-choice and essay questions, its popular CMA exam instructional videos, and a no-hassle Access Until You Pass® guarantee. Gleim has over 40 years of success helping candidates [pass the CMA exam](#).

Place your order directly online by going to <https://www.gleim.com/IMALouisville> or contact Melissa Leonard at 800.874.5346, ext. 131 or melissa.leonard@gleim.com to learn about the significant discounts you are eligible for as an IMA Chapter member. You can also fax the order form on Page 13 to Melissa at Gleim at 888-375-6940. Members of our chapter are eligible for 15-25% off the Gleim Review Systems and CPE courses.



IMA's Certification for
Accountants and
Financial Professionals
in Business

Blinded by Pressure Ethics Workshop

Our Louisville Chapter is hosting a special presentation of this 2-CPE interactive, ethics workshop via WebEx to chapter members in March for FREE.

DATE:

- Saturday, March 11th from 9:00-11:00 a.m. EST, or
- Saturday, March 18th from 10:00-noon p.m. EST

DELIVERY: Webinar via WebEx (*must connect to webinar via computer/tablet and also audio either via computer microphone/speaker or toll number to actively participate in group discussions*)

PRICE: FREE

CPE CREDIT: 2 CPE Ethics (NASBA)

DESCRIPTION: Are you willing to reach a company target at any cost? Delve into a real-world case study of alleged financial fraud by executives of Diamond Foods, Inc. See how achievement pressures can negatively impact sound judgment and compromise ethics. This workshop uses a recent IMA Education Case Journal Diamond Foods case study and the IMA Statement of Ethical Professional Practice to illustrate unethical management accounting practices. Engaging scenario-based interactive exercises will challenge attendees to identify potential financial fraud in real-life situations.

LEARNING OBJECTIVES: After this session, you will be able to:

- Recognize an ethical dilemma within an organization,
- Identify improper departures from GAAP reporting as a means to improve reported results,
- Recognize the appropriate ways to increase profits within GAAP and ethical guidelines, and
- Identify an auditor's role and responsibility when faced with an ethical dilemma.



- **Field of Study:** Behavioral Ethics
- **Program Level:** Basic
- **Prerequisites:** None
- **Advance Preparation:** Briefly review case and IMA Statement of Ethical Professional Practice (*sent separately*)
- **Instructional Method:** Group-Internet

REGISTRATION: Register online via the link below at least 24 hours before the webinar. If you have questions, contact Lisa Book at (812) 941-2055 or email at lmbook@ius.edu. **Seats are limited so register early!**

<http://www.signupgenius.com/go/10c0c4cadaa28a3f58-louisville3>

Speaker Bio: Lisa Book, CMA, CFM, MBA is Lecturer in Accounting at Indiana University Southeast. Lisa was a member of Ethics Committee for Global IMA in 2012-2014 and is a Past President of both Louisville Chapter IMA (2013-14) and Lincoln Trail Council IMA (2015-16). She currently serves as Director of Community Relations for Louisville Chapter IMA. Most recently, Lisa presented ethics workshops at IMA's Annual Conference & Expo in Los Angeles in 2015, and also South Central Indiana and Indianapolis IMA Chapters. Prior to joining the faculty at Indiana University Southeast, Lisa had 15-year career in corporate accounting working for such companies as manufacturers Fireking Security Group and Kimball International and non-profit Goodwill Industries.

This program is designed to meet the ICMA guidelines for CPE credits for CMA's and CFM's and the NASBA guidelines for CPE credits for CPAs. However, state boards of accountancy have final authority on the acceptance of individual courses for CPE credit.

Upcoming Free IMA Webinars

Inside Talk

Attend IMA's [Inside Talk Webinar Series](#) to earn one hour of FREE NASBA-approved CPE! You earn CPE credits when you attend a live webinar. Past webinars are available in the archive but do not earn credits.

Leadership Academy

IMA's [Leadership Academy](#) offers a FREE monthly education series for accounting and finance professionals to build or strengthen their leadership skills. Participation in live Leadership Academy sessions qualifies for NASBA-approved CPE credits.

Linking Financial and Operational Planning to Steer Business Performance
March 2, 2017 1:00 PM - 2:00 PM

The IPO – Are You Ready for Life in the Public Arena?
March 15, 2017 1:00 PM - 2:00 PM

Mentoring the IMA Way
March 7, 2017 1:00 PM - 2:30 PM

IMA Members: [Access the archive](#) of past Leadership Academy webinars on LinkUp IMA.

Free Webinars
Presented by Industry Experts

New Member Spotlight, *cont.*

James Followell – Director of Accounting and Finance at Rainbow Blossom



I am the Director of Accounting and Finance for Rainbow Blossom Natural Food Markets. Previously, I was Vice President of Operations for Winscribe USA in Paducah, KY, and then Director of the VR Business Brokers Hilo, Hawaii office. I obtained a Bachelor's and Master in Business Administration, and as well a Law Degree (Juris Doctor) with a certificate in Transactional Law.

One interesting fact about myself: I have lived in both Alaska and Hawaii.

My reason for joining IMA: I am joining IMA because I have always been a proponent of the collective knowledge base. Joining together to share knowledge, networks, and a passion for the work we do is extremely powerful. I am excited to learn from others in the field. Having both a business and legal background, I am looking forward to the unique insight I can bring to the table. I am currently enrolled in the CMA program.

The CMA® program continues to grow. James is one of more than 30,000 candidates in the CMA pipeline; the highest number to date. More than 6,000 new candidates have enrolled in the CMA program so far in Fiscal Year 2017.

Get Involved! 2017/18 Board Members Needed!



In the upcoming year, take your IMA membership to the next level and become a leader with your Louisville Chapter! As many of our longer-term board volunteers are transitioning off of the board, we need your help to remain an active chapter in 2017/18! We want to continue to make an impact in our local community through our professional development conferences and seminars, mentee-mentor program, Student Night, community service activities, campus visits, networking events, etc. However, this requires “boots on the ground” locally.

We are in critical need to fill several 2017/18 board positions, including President, and are looking for passionate volunteers to help keep us active in the local area. Please keep in mind that our board volunteers will be provided guidance, training, and support both on the local and global level. We encourage you to peruse the list of open positions on the right and contact President, Dennis Harding, at d_harding1969@yahoo.com about these opportunities.

Don't just be a member in 2017/18 . . . be an involved leader! Volunteer today, and help build leadership skills to advance in your career and be part of empowering the profession and helping other local members achieve their professional goals!

- **President**
- President-Elect & VP Administration (*assists President as needed and next-in-line for President*)
- Director of Professional Education (*helps arrange and coordinate speakers for our professional development events*)
- Director of Meetings (*makes facility and food arrangements for our events*)
- Director of Meeting Attendance (*coordinates registration and also CPE reporting*)
- Director of Community Relations / Newsletter (*sends notices to chapter members and prepares chapter newsletter*)
- Webmaster (*IMA is rolling out new, easy-to-use website template for chapters*)
- Director of Roster (*prepares yearly roster*)

Contact President, Dennis Harding, at D_harding1969@yahoo.com to volunteer for these or other possible positions, or for questions.



IMA Milestones

These members are all celebrating milestones! Please join us in congratulating our continuing chapter members.

Congrats New CMA's!

David Thomas, CMA, CPA – David is a CPA currently working as a Programmer Analyst on the Business Warehouse team at Kindred Healthcare. He has worked in external/internal audit, business intelligence/IT, as well as statistical analysis/modeling. He is interested in combining these skills and resources to help guide and evaluate financial decision making. He became a CMA to demonstrate proficiency, and network with professionals, in a variety of topics across these fields. David earned his CMA certification in September 2016. Congrats, David!



IMA's Certification for
Accountants and
Financial Professionals
in Business

For more than 40 years, CMA (Certified Management Accountant) certification has been the global benchmark for management accountants and financial professionals. CMAs can explain the "why" behind numbers, not just the "what." And that can give you greater credibility, higher earning potential, and ultimately a seat at the leadership table. Visit www.imanet.org/cma.

Please send your IMA & CMA stories and accomplishments to Director of Community Relations, Lisa Book, at lmbook@ius.edu. The deadline for our next newsletter is Apr. 20th.

Celebrating Anniversaries in February 2017 – March 2017

Over 30 years

F. Donald Carrico (63)
Donald W. Grant (56)
Carolyn A. Mountz (43)
C. J. Scott (67)
Jack L. Shekell (63)
Raymond G Strothman, CPA (45)

26-30 years

Kevin Adams, CMA, CFM, CPA (28)
Jack O. Kelley, CMA (28)
David L. Shadburne, CMA, CPA (28)

21-25 years

Patricia H. Birk, CMA, CPA (23)
Patricia A. Ellis, CMA, CPA (22)
Daniel W. Kelly, CMA (24)
Robert A. Poe, CMA (24)
Elizabeth J. Thompson, CMA, CPA (21)
Richard L. Tinsley, CMA, CPA (24)

16-20 years

John E. Dickinson, CMA, CPA (20)
Jeffrey S. Hamilton, CMA, CPA (16)
Kathleen M. Line, CMA (16)
Gary L. Southard (18)

11-15 years

Douglas E. Brown, CMA, CPA (15)
Fred M Cuzick, CPA (15)
Kaly D. Kramer (12)
William J. Russell, CMA, CPA (15)
Jennifer L. Taylor, CMA (15)
Timothy M. Wallen (15)

6-10 years

Tanya L Barnett (6)
Edwin J. Miller, CMA (8)

2-5 years

Savannah Camp (2)
Stewart Darling, CMA, CIA (2)
Stephanie Stumph, CMA (3)
Dawn Williams, CMA (4)

1 year

Kristine Barron, CMA
Leslie Dearing
Andrew Gutierrez
Allie Kellerman
Bryan Mabry





Louisville
Chapter

THE LOUISVILLE CHAPTER OF INSTITUTE OF MANAGEMENT ACCOUNTANTS PRESENTS:

LOUISVILLE SPRING CONFERENCE

APRIL 28 • 7:30am-5:00pm

8 CPE credits

University of Louisville, Shelby Campus
Founders Union Building,
450 N. Whittington Pkwy.
Louisville, KY 40222



Help prepare yourself for the "winds of change" by attending Louisville IMA Chapter's 4th Annual Spring Conference. Dr. Uric Dufrene will provide the latest update on the Louisville Metro economy and also general outlook for the nation's economy, while Kenneth McGee will help us rethink traditional cost accounting. Our panel of local CFO's will share insights on the changing role of CFO's and share best practices in managing workforce, reducing risks to bottom line, and management reporting. In addition, high-energy speaker, Greg Coker, is returning to present a lengthier session on "soft skills" guaranteed to increase employee effectiveness, while boosting your company's productivity, retention, and customer service. See *Conference Schedule* for complete listing of sessions and speakers.

Who Should Attend

Accounting and finance professionals from all levels who wish to increase their skill sets in issues and challenges faced in today's work environment and to help develop the key competencies needed to become strategic partners within their company.

Education Sessions

This program is designed to meet the ICMA guidelines for CPE credits for CMAs and CFMs and the NASBA guidelines for CPE credits for CPAs. However, state boards of accountancy have final authority on the acceptance of individual courses for CPE credit.

Please visit <http://louisville.imanet.org> for more information about this conference, the Louisville Chapter IMA, or Global IMA.

<http://www.signupgenius.com/go/10c0c4cadaa28a3f58-louisville4>



The Association of
Accountants and
Financial Professionals
in Business

CMA®

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

CONFERENCE SCHEDULE

7:30-8:00: Registration & Breakfast

8:00-9:30: Economic Update (1.5 CPE)

Uric Dufrene, Ph.D., *Executive Vice Chancellor of Academic Affairs and Sanders Chair in Business at Indiana University Southeast*

Field of Study: Economics

9:30-9:45: Networking Break

9:45-10:45: Cost Accounting in Today's Complex Environment (1 CPE)

Kenneth McGee, CMA, MBA, *Vice President of Finance - Corporate Controller at IDX Corporation.*

Field of Study: Accounting

10:45-11:00: Networking Break

11:00-12:30: CFO Panel Discussion (1.5 CPE)

Bill Beavin, *CFO at American Printing House for the Blind*;
Paul Bruce, *Senior Vice President Financial Operations & CFO at Farm Credit Mid-America*;

Glen French, CPA, *COO/CFO at Strothman & Company*;

Kristina Merrill, CPA, CMA, *CFO at Sky Racing World.*

Field of Study: Business Management & Organization

12:30-1:15: Conference Luncheon

1:15-5:00: Soft Skills Bootcamp (4 CPE)

Greg Coker, *Government Affairs/Organization Development for Capital Link Consultants.*

Field of Study: Personal Development



- **Advance Preparation:** None
- **Prerequisite:** None
- **Experience Level:** Intermediate
- **Teaching Method:** Group-Live

Registration at:

<http://www.signupgenius.com/go/10c0c4cadaa28a3f58-louisville4>

CONFERENCE FEES THRU 3/31

\$100 for IMA Member;
\$125 for Non-Member;
\$50 IMA Student Member.

**All fees increase by \$25 after 3/31.*

**Fees include breakfast, lunch, and snack.*

Cancellation policy:

Cancellations received by noon on 4/21 will receive a full refund; no refunds after 4/21.

REGISTRATION

Registration deadline is noon on 4/21. Register online and make secured payment (PayPal) by going to event link at: <http://www.signupgenius.com/go/10c0c4cadaa28a3f58-louisville4>. For alternate registration and payment or changes, contact Lisa Book at 812-941-2055 or email lmbook@ius.edu. *Seats are limited so register early!*

SCHEDULE CHANGES

We reserve the right to change speakers when necessary and to cancel the program as appropriate with a minimum of one-week advance notice to registrants. Should this occur, all registration fees will be refunded in full.

IMA PHOTO RELEASE STATEMENT

Photographs may be taken at this event. These photos may be used on the Louisville IMA website, newsletter publications, or other materials. By attending this event, you authorize the Louisville IMA Chapter to use your image in any IMA-related publications or websites.

REGISTRATION

QUESTIONS Contact Lisa Book at 812-941-2055 or email lmbook@ius.edu.

Board Member Spotlight

Jennifer Kline, CMA – Director-at-Large & Past President



Originally from Brandenburg KY, I attended the University of Louisville. I now live in Middletown and have worked for the American Red Cross for more than 16 years; I am currently on their Hyperion reporting team. I met my husband Michael (also an

IMA member) in an intermediate accounting class and we have a son Ben who is a sophomore at the University of Louisville. When not working, I am an avid tennis player, enjoy learning new crafts, photography, listening to music and watching movies.

Tell us one interesting fact about yourself. I had perfect attendance through 12 years of school and it continued through college.

What do you think your involvement in IMA has done for you professionally and/or personally? It has helped me grow both professionally and/or personally. I was very shy and reserved and being surrounded by a great group of professionals helped me to break out of my shell and become more confident and comfortable meeting people.

What is best piece of advice you have for local chapter members? Get involved. Just a little time will go a long way in your development and career.

Why do you recommend that chapter members get involved on their local chapter board? It is a great way to network and build your social skills. When asked by Past-President Jean Isaacs to take a small role in the board by helping to get the chapter roster together, who would have thought that I would grow confident enough to lead the chapter several years later as their president. It was a great opportunity for me to grow personally and professionally.

Who are your IMA mentors, and what have they meant to you? Jean Isaacs and Bob Smith are two of my IMA mentors. Jean got me involved in the chapter and was there to answer any question that I had. Bob is a long-term member and set the bar for what being a member and member of the board should be. He was always a cheerleader for me and the other board members to succeed.

What is your most favorite IMA moment? Other than passing my final part of the exam and becoming a CMA, it would be when I was president of the local chapter and on recognition night, brought together 15+ past presidents in one place. It was a great opportunity to meet past presidents and reminisce of their time in office. Many of them had to an opportunity to reconnect. It was one of my favorite moments.

Why did you pursue the CMA? The CMA was more relevant to the field that I was working and encompasses all of the knowledge learned in business school. To me, this makes me a well rounded staff member and able to face any project that comes my way.

Let IMA's Career Driver Help Keep Your Career Goals on Track!

Did you make a New Year's resolution for your career? It's time to get into action and keep your career goals on track. Whether you're looking to strengthen skills you already have or discover new possibilities, IMA's career management tool – CareerDriver® – has the right personalized approach for you. [CareerDriver's](#) three-step approach is designed to help you evaluate your skill set, create a personalized development plan, and explore career paths. Jump in the driver's seat to make your career resolutions come true.

Your Local Institute of Management Accountants (IMA) Council Presents:

“MrExcel” – POWER EXCEL SEMINAR

April 21st - Indianapolis IN

Lincoln Trail Council of Institute of Management Accountants (IMA) is excited to partner with Bill Jelen - Microsoft Excel expert, Host of MrExcel.com and Former Financial Analyst - to bring powerful Excel Tips & Tricks to you! Join us for this full-day seminar and **earn 8 CPE credits**. Get an immediate return on your investment as you learn efficient, powerful tips, tricks, and techniques to save you hours each week. Session is fast-paced and based on topics most relevant to today's business users.

- For regular and heavy users of Microsoft Excel - CFO's, Analysts, Controllers, Accountants, Finance, Insurance, etc.
- Morning Program includes charting, data visualizations, formulas, sorting, filtering, subtotals, pivot tables, and VLOOKUP
- Afternoon Program includes power query, power map, power pivot, power BI Desktop and advanced functions
- **VALUE** - includes 8 CPE, two (2) books to take home, and continental breakfast and lunch!
- Laptops are welcome, but not required.

WHERE: Indiana CPA Society Professional Dev. And Conference Center
8250 Woodfield Crossing Blvd., #100
Indianapolis, IN 46240

PRICE:

- **On or Before 3/24 (Save \$25):** IMA/INCPA Member \$130, Non-Member \$155
- **After 3/24:** IMA/INCPA Member \$155, Non-Member \$180
- *Member pricing available for companies with 5+ attendees. Email lincolntrailima@gmail.com.*

FOR MORE INFORMATION AND REGISTRATION:

Registration: Registration is open through April 14, 2017. Register online and make secured payment by going to www.lincolntrail.imanet.org/mrexcel
For additional questions, please email lincolntrailima@gmail.com.

Cancellation Policy: Cancellations received by April 14, 2017 will receive a full refund; no refund after April 14.

IMA Membership Discount: Not a member of the IMA? Join now for 10% off membership and no registration fee! **Code: LTEXcel2017**

<http://imaonlinestore.com/PersonifyEbusiness/Default.aspx?TabID=258>

About MrExcel

...

Bill Jelen is the host of MrExcel.com and the author of 49 books about Microsoft Excel. He has made over 80 guest appearances on TV's Call for Help with Leo Laporte and was voted guest of the year on the Computer America radio show. He writes the Excel column for Strategic Finance magazine and is a contributing editor to CFO Magazine. Before founding MrExcel.com in 1998, Jelen spent twelve years "in the trenches", as a financial analyst for the accounting, finance, marketing, and operations departments of a publicly held company.



Lincoln Trail
Regional
Council

GLEIM® IMA Chapter Program Chapter**Member Order Form GLEIM® CMA Review**

Send this form to: 888.375.6940, Attention Melissa Leonard (FAX) or
melissa.leonard@gleim.com

Name: _____

Chapter: _____ Member #: _____

Street Address: _____

City, State, & Zip: _____

Phone Number: _____ Email Address: _____

Premium CMA Review System***(Retail ~~\$1599.00~~ - \$1249.00 introductory price)**

Gleim Premium Review System, which includes
 CMA Gleim Instruct, the largest test bank of
 multiple-choice and essay questions, expertly
 authored books, and the Gleim Access Until You
 Pass® guarantee. Chapter members save 25%.

Chapter Price \$936.75

\$

Subtotal

Free Shipping**

\$0.00**Grand Total**

\$

Totals

*Also available per part. Contact Melissa Leonard for details.

**Free shipping in the contiguous
U.S.

For additional information, contact:

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

Credit Card Number: _____ - _____ - _____ - _____

Expiration: _____ Cardholder Name: _____

Please Note:

1. Prices on this order form are for the Gleim **Premium CMA Review System**.
2. Prices subject to change without notice.
3. All orders subject to chapter membership verification.
4. Florida shipments subject to sales tax.

Louisville Chapter member, Kristina Merrill, was among three professionals interviewed for the following article that appeared in the February 2017 issue of Strategic Finance. Kristina previously served on the board of directors of the Louisville chapter and currently serves on Global IMA board of directors. In this article, Kristina shares the impact of earning CMA certification on her career.

THE CMA PROGRAM: DESTINATIONS DELIVERED

By Jeffrey C. Thomson, CMA, CAE

Appeared in February 2017 issue of *Strategic Finance*



As I think about the lifelong value of the CMA® (Certified Management Accountant) certification, I sometimes liken the CMA program to a travel agent. Like earning your CMA, traveling to your destination is only part of the enriching journey. There's also the planning, where you learn about your destination and its different cultures, norms, and values.

To earn your CMA, in addition to passing the exam there are the hard-earned degrees, the gaining of business experience, and the actual

study and learning process. That journey doesn't end with one "destination delivered." It leads you to take it to the next level of excitement, enrichment, and inspiration! What's next on your learning and growth journey? Many CMAs have become senior business leaders inside and outside finance and accounting: CEOs, CFOs, controllers, VPs of supply chain, SVPs and chief innovation officers, board members, and more.

For the remainder of this article, don't think of me as IMA's CEO—think of me as your travel agent in sharing stories of incredible professionals who have leveraged their CMA to become highly successful business leaders and what they hope to achieve next.

As many of you know, I was CFO of an \$18 billion strategic business unit (SBU) in one of the world's largest and most prestigious companies during a very tumultuous period. But a decade and a half ago, I was actually referred to as CFO and business partner to the SBU. My point is that the role of the CFO team has long evolved beyond the trusted and required role of value steward (in financial accounting, which includes audit, tax, compliance, statutory reporting, safeguarding of assets, etc.) to include value creator (in management accounting, which includes insight, foresight, financial planning and analysis (FP&A), mergers and acquisitions (M&A), predictive and prescriptive analytics, etc.). As Dave Burritt, CMA, CPA, former CFO of Caterpillar and current CFO of U.S. Steel, likes to say, the CFO team serves as the trusted business advisor. Just as the business value chain has become more interdependent, the critical roles of finance, accounting, operations, technology, and strategy have become more interdependent in the quest to deliver sustainable value to stakeholders.

But with this opportunity, and perhaps even obligation, comes the challenge of talent. We need business professionals who can deliver information *and* insight, data *and* decisions, formulas *and* foresight. This is where the CMA program fits. As the world's leading credentialing program in management accounting, it has a body of knowledge that mirrors the value chain by spanning competencies in finance, accounting, strategy, and operations. I'm proud to say that the CMA continues to play a significant role in helping close the talent gap and deliver to the market ethically

sound business professionals who exhibit technical accounting depth with business operations breadth.

Now it's time to hear from three "travelers" who have had their destinations delivered with the help of the CMA program. There are many more of these stories to tell, and I'll be sharing them with you in the magazine and on the IMA website.

KATIE ATON JACKSON, CMA, CPA

Destination Delivered: Business Owner

Katie is the sole proprietor of Smillie & Jackson, CPAs, LLC, and is responsible for servicing clients, seeking new clients and business, independently supervising staff, payroll preparation, individual and business income tax return preparation, tax planning, consulting, compilations, reviews, and administration of this public accounting firm.

Katie is a former IMA Young Professional of the Year award winner with quite a story and journey to share. She actually learned of the opportunity to buy into the firm she now owns at an IMA chapter meeting! To quote IMA Chair-Emeritus Ben Mulling (a CFO at age 28), Katie says, "The CPA helped me get the job, but the CMA helps me do my job." She explains that "The CMA content, with its emphasis on operations, strategy, and financial planning, has been instrumental in enabling me to grow my business with an emphasis on personalized client services and a broader range of advisory services." What's the next destination on her journey? Business growth, expanded lines of business to add value to her clients, and community service.

ANTHONY N. CASPIO, CMA

Destination Delivered: VP, Global Supply Chain

Tony is a vice president of Supply Chain at Sealed Air Corporation (*Fortune* 500, \$7B revenue, 25,000 employees, more than 70 countries), leading its global equipment operation of 500 associates spanning nine plants and more than 30 warehouses around the world. According to Tony, "As I progressed in my career, I felt I needed to differentiate myself and grow. I evaluated pursuing an MBA or the CMA. I concluded that the CMA would deliver the greatest value for the investment. With a strong financial acumen and building more confidence as I advanced in the company, I developed a stronger passion to move from reporting value to helping create and deliver value. This has helped me cross over from corporate finance, business finance, and supply chain finance more recently to supply chain transformation and strategy, and, now, operations."

Thank you, Tony, for describing how the CMA program helped you reach this important destination of relevance and influence. Your next desired destination is becoming president of a business unit!

KRISTINA L. MERRILL, CMA, CPA

Destination Delivered: CFO, M&A/Turnaround Expert

Kristina is CFO at Sky Racing World (SRW), part of the international division at Tabcorp Holdings Limited, Australia's leading wagering, racing media, and Keno operator and one of the world's largest publicly listed gambling companies. Kristina has occupied roles as controller and CFO for more than 16 years, having attained her first controllership at age 26 and her first CFO role at age 29. For most of the past 10+ years, she has specialized in helping organizations with turnarounds, M&A, positioning, and growth strategies. At SRW, in addition to "traditional" accounting activities, Kristina leads M&A, HR, and infrastructure IT. She's truly a versatile CFO!

The CMA enabled her to reach this fast-paced (racing) destination by gaining technical expertise (including the education from studying for the exam), credibility (the CMA is a differentiator that

demonstrates competence, ethics, and an appetite for success), and confidence (taking on new or expanded roles, tackling difficult projects, encouraging people, etc.). According to David Haslett, CEO of SRW: “When SRW was established at the beginning of 2014, it was treated as a startup with a small management team, and key skills were an important factor to deliver on the objectives and grow the business. This required a CFO with more than just a finance background, and Kristina’s management experience, CMA certification, and M&A experience were key factors in the hiring decision.” What’s next for Kristina on her career journey? Longer-term, it’s a senior-level position in operations to round out her business management experience. As she says, “Passing the CMA exam for me was a pivotal event in my life both personally and professionally.”

I hope you are as inspired as I am by the incredible destinations that these three fine professionals have reached, enabled by their hard-earned CMA. CMAs have achieved influential positions in finance, accounting, operations, and strategy. Become a CMA and reach destinations that you couldn’t otherwise have reached to enrich your personal brand, organizational capability, and the public interest.

Jeffrey C. Thomson, CMA, CAE, is IMA president and CEO. He also is a member of IMA’s Bergen-Rockland-Meadowlands Chapter. You can reach Jeff at jthomson@imanet.org or follow him on Twitter: @IMA_JeffThomson.

IMA Announces Ginger White as 2017-2018 Chair-Elect



The Louisville Chapter is pleased to announce that Ginger White, CMA, has been named Global IMA Chair-Elect for IMA’s fiscal 2017-2018 period. Ginger has been a “friend” of the Louisville chapter for many years, both as a member of Lincoln Trail Council (IMA Council that supports seven chapters, including Louisville chapter) and also as previous presenter to our chapter on Six Sigma topics (latest Fall 2015). Congrats, Ginger!

Ginger is currently the corporate purchasing finance director at Cummins Inc, a global power leader that designs, manufactures, sells, and services diesel and alternative fuel engines; diesel and alternative-fueled electrical generator sets; and related components and technology. Based in Columbus, Indiana, Ginger supports Cummins global, direct, and indirect purchasing leaders with financial reporting and analysis, responsible for a

\$12B companywide spend. She has been employed by Cummins since 1997.

Currently, Ginger is serving on the IMA Global Board of Directors and is a member of the Planning and Development Board Committee. A member of IMA since 1999, Ginger has held various positions on the Board of IMA’s South Central Indiana Chapter, including a term as president. She also served on the Lincoln Trail Regional Council, where she was the IMA student representative, chair of the student committee, regional vice president, and president. She previously served two terms as chair of IMA’s Member Relations Board Committee, a term as chair of IMA’s Performance Oversight and Audit Board Committee, a member of IMA’s Nominating Board Committee, and a member of IMA’s Governance Committee.

January 10, 2017

Louisville Chapter IMA

Our chapter collected donations at the Fall conference to participate in Sunrise Children's Services' Christmas Sponsorship Program. Sunrise operates ten residential treatment facilities and therapeutic foster care homes throughout the state. Each day, Sunrise cares for hundreds of abused and neglected children. Thanks to the generosity of our conference attendees and chapter board members, we raised about \$100 to sponsor a child's Christmas wish list. This is the thank-you letter we received, and also a page from their latest newsletter. Thanks to all that helped make this possible!

Dear Friends of Sunrise:

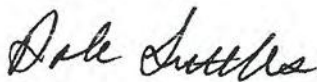
Today, you helped a child!

Thank you so much for your thoughtful donation of clothing and doll clothes. We couldn't provide for these children without the help of caring people like you.

There are many ways to support the children at Sunrise, and one very important way is through in-kind donations like yours. Please know your donation goes a long way in helping with the costs of providing for the 600 children we care for each day.

Thank you, from the children at Sunrise, for thinking of them and providing them with a shot at a better future.

Kind regards,



Dale Suttles
President

Date of gift: Thursday, December 22, 2016
Value of gift: \$150.00

We acknowledge that we did not provide you any goods or services in whole or partial consideration for your contribution. Please save this acknowledgment letter as your receipt. Gifts and bequests to our ministry are deductible for income and estate tax purposes.

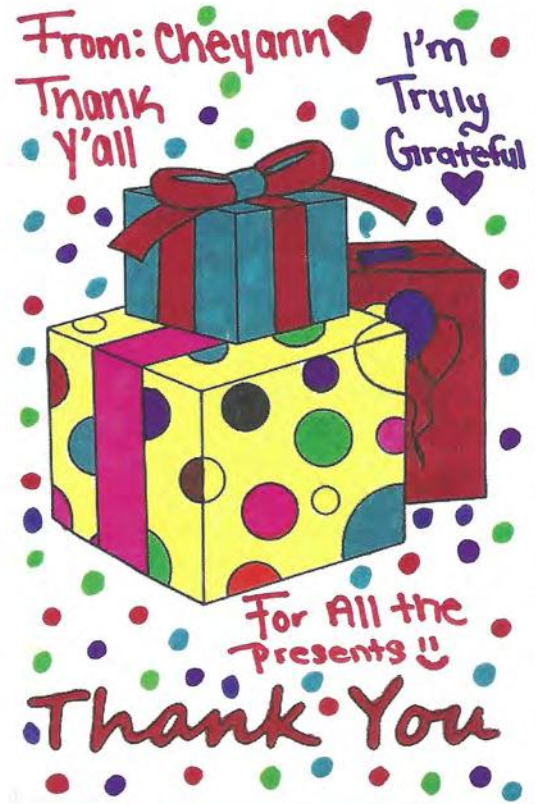


Helping children in crisis shine

To all the donors and support Sunrise kids received through the holidays, *a Heartfelt Thank you!*



A young man takes an impromptu nap after a Christmas shopping spree at Dillard's in Lexington, courtesy of some very generous Sunrise supporters.



December 21, 2016
Dear Sunrise,
When I opened the presents I was so surprised! I just want to say thank you so much. Another thing is taking me out of that home.
Love,
Haydan



Louisville Chapter #032
Institute of Management Accountants
\$500 Scholarship Application

Instructions to the Applicant:

The Louisville Chapter of the Institute of Management Accountants is offering a financial scholarship to the qualifying student. The scholarship may be applied to the 2017-2018 school year beginning with summer 2017 and ending with spring 2018. Applicants may be enrolled in graduate, undergraduate or certificate programs. ***To qualify a student must:***

1. Carry a minimum of 6 credit hours in Accounting or Finance courses for the semester or quarter to which the funds are to be applied for full-time Students. Part-time Students will be required to carry a minimum of 3 credit hours for semester or quarter for which funds are to be applied. The University must be within the geographical boundaries of the Louisville Chapter.
2. Intend to pursue a career as an accounting or financial professional after graduation.
3. Have a declared major or emphasis in Accounting or Finance.
4. Have an academic grade point average of 3.0 or higher on a 4.0 maximum scale, including transfer credits.
5. Provide an essay (approx. 400 words) applying an academic topic of interest to your job. If not employed then discuss how you expect to apply a specific accounting/finance topic.
6. Have attained junior standing. Purpose to ensure Candidate commitment to Accounting or Finance career.
7. Commit to attend presentation at May IMA Meeting.

Selection will be based on the following elements:

1. Academic merit.
2. Strength of essay linking educational topic to career objective.
3. Demonstrated community leadership through extracurricular activities such as Clubs/Memberships (Civic or Academic including official offices and positions); Community Service; Awards/Accomplishments; etc.
4. Presentation and quality of application and essay.

To apply:

- Complete the application information on the reverse side of this page and include:
- A current transcript
- A written description of your extracurricular activities and employment history
- An essay linking an academic topic of interest to your career or anticipated career.

Mail the application with attachments to:

c/o IMA/Scholarship Selection Committee
R. Kevin Adams
Kentucky Exposition Center
P. O. Box 37130
Louisville, KY. 40233

or email to:

Subject: IMA \$500 Scholarship
kadams@ksfb.ky.gov
(502) 367-5243

Applications must be postmarked by March 15, 2017 and received by March 20, 2017. The qualifying recipient and a school representative will be invited to attend as honored guests at our May Chapter Meeting to receive scholarship award. Thank you for participating in the (2016-2017) Scholarship Program.

Louisville CHAPTER #032
Institute of Management Accountants
Scholarship Application 2016-2017

Please type or print

Personal Information

Name: _____

Present Address: _____

City: _____ State: _____ Zip: _____

Area Code & Phone: (_____) _____

Permanent (Home) Address: _____

City: _____ State: _____ Zip: _____

Area Code & Phone: (_____) _____

Educational Information

College/University: _____ Major GPA: _____

Declared Major: _____ Cumulative GPA: _____ Anticipated Date of Graduation: _____

School & Community Activities

Attach Resume or a separate sheet listing significant extracurricular activities and the extent you are involved with them. Include hours of participation and any official offices or positions. Also include job experience, certifications, community service, awards, etc.

Career Objectives

On an attached sheet, write an essay of 400 words or less, discussing how you have applied an accounting or finance topic in your job. If you have not had any relevant work experience, discuss what led you to select a career in accounting or finance. Please be sure to discuss your career objectives or goals.

Attach Transcript (Official or Unofficial)

I certify this information is true, complete and accurate to the best of my knowledge. I authorize release of the information to confirm and/or verify this application.

Applicant Signature: _____ Date: _____