

The Golden Pen News

The latest from the Golden West Council of the IMA

Welcome to the Golden Pen News. The Pen is published quarterly for the Golden West Council Members. If you have an article which you wish to submit to the Pen regarding a chapter activity, a community service activity, or just general information in the next quarter's issue, please send the information to the GWC VP of Communications at ima.goldenwestcouncil@gmail.com.

We ask that if you are thinking about opting out of the newsletter and other correspondence from the Council that you send an email to Nicole Sheets, President of the Council, with suggestions on how we can serve you, the IMA Member, better in your path forward.

Message from the President

Spring is here and I am looking forward to it now more than ever. Spring represents an awakening for me. The trees start getting new leaves, flowers are blooming and the weather starts getting warmer. We have made it through the dark and cold of winter and are making a fresh start. Last year, for Easter, we weren't allowed to go anywhere because of sheltering in place. This year, things are starting to open back up and we might be seeing the light at the end of the tunnel. I have received my first vaccine and am so relieved. Even if I am only 50% protected, I feel thankful for it. Now I don't have to be so concerned about going out and being around people. Hopefully this also means that soon we will be able to start holding our regular meetings. I miss see all of the members. My chapter, Peninsula Silicon Valley usually holds a FMN session monthly and I looked forward to seeing a lot of the same faces every month. Now I haven't seen these people in over a year and look forward to catching up with them.

Golden West Council is holding a virtual meeting on May 22nd. It's our annual Leadership Training session. Mark your calendars now. The agenda is included in this newsletter and I think you'll really enjoy it. At least we'll be able to spend some time together even if it's only virtual. Here's hoping that we'll all be able to see each other real soon.

Nicole,

Nicole Sheets, President
Golden West Council
Email address: nlsheets@sbcglobal.net



The Association of
Accountants and
Financial Professionals
in Business

Inside this issue

Leadership Seminar	2
GWC Council Meeting Agenda.....	2
Guest Speaker's Bio.....	3
Future conferences.....	3

IMA/GWC Vision

Be the resource for developing, certifying, connecting, and supporting the world's best accountants and financial professionals within businesses

IMA/GWC Mission

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

IMA/GWC Strategic Goals

- Win additional market share with "CMA First", an aggressive pipeline building effort and expansion of the CMA® in the U.S. and globally
- Drive member retention and loyalty in all regions by delivering tangible value through relevant programs, products, and services
- Raise awareness in the Student/Academic market to expand the membership pipeline and reach the young CMA certified professionals of tomorrow
- Master Technology that directly impacts IMA members and our value proposition

GWC Annual Leadership Training

Golden West Council (GWC) proudly offers the annual Leadership Training as follows:

Date: Saturday May 22, 2021
Time: 9 am – 12 pm PT
Speaker: Ron Durkin, MBA, CPA, CFE (retired)
Location: Virtual
Credit: 2 CPEs
Cost: Free

About the GWC

The Golden West Council is one of twenty-four USA Regional Councils within the Institute of Management Accountants. Its purpose is to provide a pool of resources to assist the local IMA Chapter in attaining the objectives of the national and local organizations. Our Council brings together Eleven Chapters in Northern California, Northern Nevada, and Hawaii to participate in activities that may be too large for a Chapter alone to sponsor.

The council activities include participation in and sponsorship of Leadership Training Sessions, Chapter Management Seminars (CMS) for officers and directors, Regional Educational Seminar and Training (REST), hospitality suites at the Annual International Conference, social events, and formation of new chapters.

The Council teams with chapter leaders and members to share successful chapter strategies and experiences that will assist chapter leaders in moving their chapters

Fraud Segment (1 CPE): "Found Fraud; Now Who Are You Going to Call?" (Ron Durkin)

- Investigating allegations of fraud and misconduct
- Investigative techniques
- Fraud reporting
- Pitfalls to reporting

Internal Control Segment (1 CPE) : "What Internal Controls Are In Place to Detect Fraud?" (Ron Durkin)

- Assessing internal controls and the control environment
- Fraud risk profiling
- Management override of internal controls
- Working with auditors

Chapter Best Practice Discussion (lead by Scott Berry)

- Member engagement, CPEs, next generation of finance and accounting professionals, chapter leadership recruitment

Due Date for Registration: Friday, May 21, 2021

[Click here to register for the event](#)

GWC Council Meeting Agenda

May 22, 2021 12:30pm—1:30pm [Click here to attend the meeting](#)

12:30 PM – 12:35 PM	Welcome	Nicole Sheets
12:35 PM – 12:45 PM	State of the Council Report for 2021 - 22 Obtain signatures for annual Ethics Agreement & IMA Core Values Agreement Forms	Nicole Sheets
12:45 PM – 12:50 PM	Feb. 2021 Minutes Review & Approval	LuAnn Klann
12:50 PM – 01:00 PM	Financial Report 2021 3 rd Quarter Results 2021-22 Tentative Budget Approval of Outstanding Bills	Robert Hulin
01:00 PM – 01:10 PM	REST Payment follow up from the REST 2020 Plans for 2022 – Feb 24 – 26 at the Atlantis Two GWC REST scholarships for 2022	LuAnn Klann
01:10 PM – 01:30 PM	Dates and Locations for 2021-2022 Year Tentative and for discussion AUG 14, 2021 NOV 13, 2021 FEB 24, 2022 MAY 14, 2022 Closing Remarks	Nicole Sheet

The Golden West Council is the volunteer sub-organization that supports the IMA, 11 Local Chapter organizations, and Members At Large in the geographical area of Hawaii, Northern California, and Northern Nevada.

Our Guest Speaker Ron Durkin's Bio



Ronald L. Durkin is a Senior Managing Director of Durkin Forensic, Inc. (DFI). He founded DFI in 2008 after retiring from KPMG, LLP where he was the National Partner in Charge of Fraud and Misconduct Investigations and also served as Western Region forensic practice leader. Ron is a retired Arthur Andersen partner and was fortunate to have served

his country both in the military and as a special agent with the Federal Bureau of Investigation (FBI). During his tenure with the FBI, Ron was a member of the Bureau's Special Weapons and Tactics (SWAT) team.

Ron works closely with internal auditors and their companies in performing fraud risk assessments, designing compliance and ethics programs and conducting internal investigations. He also provides fraud and fraud related training programs for companies focusing on prevention, detection and response.

Ron has been a frequent speaker at the FBI Academy and at various FBI sponsored training events for FBI agents who are CPAs. He was the first chair of the American Institute of Certified Public Accountants (AICPA) National Conference on Fraud and has made several presentations at these conferences. He has also made presentations at several IIA and ACFE conferences as well as those sponsored by the California Society of CPAs and other state CPA societies. He was an adjunct professor at University of Nevada at Reno where he taught graduate school class entitled "Forensic Auditing and Fraud Examination." Ron has also made presentations to graduate level accounting students at University of Texas, LSU, ASU and BYU.

Named AICPA Volunteer of the Year for 2003, Ron was also honored in 2006 with the AICPA's Distinguished Achievement Award for his long-time commitment to the organization. In 2007, the AICPA honored him again with its first-ever Forensic and Litigation Services Lifetime Achievement Award.

Golden West Council 2020-21 Board of Directors

President	Nicole Sheets	Peninsula-Silicon Valley
Secretary	LuAnn Klann	Central California
Treasurer	Robert Hulin	East Bay - Northern California
VP of Education	Scott Berry	Reno Area
VP of Administration	Patricia Mayer	Diablo Valley Chapter
VP of Communications	Eunji Seo	Fresno Area

IMA Conferences & Webinars

IMA's Annual Conference & Expo (ACE 2021) - Virtual 2021

When: June 13-16, 2021

Registration is now open for ACE2021! Join the virtual Conference experience designed to inform, inspire, and energize finance and accounting professionals from around the world. Early Bird rates only \$195 for IMA members through April 30. [Register now!](#)

IMA Women's Leadership Summit- Virtual 2021

When: Friday, April 23, 2021, 7 a.m. to 2:30 p.m. PT
Cost: Free for IMA members; \$50 for nonmembers

Registration is now open for the next IMA Women's Leadership Summit, coming to you virtually. Sponsored by Workday, this is an incredible opportunity to learn from experienced professionals, exchange ideas, and take charge of your future—all from the comfort of your computer. [Register now!](#)