



The Association of
Accountants and
Financial Professionals
in Business

The Golden Pen News

The Latest from the Golden West Council
2016-17 Vol. 01

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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 Patricia Mayer, President of the Council (pattmayer@earthlink.net) with suggestions on how we can serve you, the IMA Member, better in your path forward.

→ Message from President Patricia Mayer

Welcome to the new 2016-2018 Golden West Council term; and thanks to all the officers who have volunteered to assist and serve.

We had a great Leadership Training Program in Pleasanton this past May, and thanks to all who put it together.

It's fascinating to realize that we are part of a 70,000+ member organization that began in October 1919 - one that promotes professional education, a nationally recognized certification program, continuing education events like REST, and networking.

Thus, it is a distinct honor to lead the Golden West Council and follow in the steps of those for whom I have so much respect.

I'm loyal and grateful to this organization because it made it possible for me to become a CMA in 1993. I credit the organization, and especially my local chapter, with whatever business success I've had from attaining that certification. I am convinced that I never would have been able to move from being a VP in a "not for profit" environment to a profit entity without it.

The CMA program differentiates us from other accounting organizations. It's a good reminder when we go back to our individual chapters that

Global wants us to use our Council resources to support and encourage both the CMA program, and involvement with colleges and universities through our student activity programs.

Looking back, a local chapter outreach worked for me and several other accounting students. We were introduced to the IMA in the late 1970s when an accounting professor from Cal State Hayward invited us to attend several meetings. Each meeting included a discussion of current financial and business trends, and gave tips on how to gain a competitive edge. We found it exhilarating to be in the company of others who took professionalism seriously and who wanted to intellectually challenge themselves.

Moving forward, I am excited about our - soon to be upon us - Council meeting on Saturday August 27th, which will be a mix of business and frivolity. We will meet at the *Folktale Winery* in the beautiful Monterey/Carmel Peninsula. (Nicole Sheets has made all the arrangements at this facility.) We will have a 2-hour business meeting and discuss what other goals and objectives you want to see in the next two years, and how we can best assist member chapters.

Afterwards, let the food and bubbly flow- all for only ten dollars per person!!

Patricia Mayer
 President
 Golden West Council of the IMA
pattmayer@earthlink.net

 **2016-2018 Board Nominations**

| <i>Position</i> | <i>Volunteer</i> | <i>Chapter</i> |
|---|------------------|--------------------------|
| President | Patricia Mayer | Diablo Valley |
| President - Elect | Nicole Sheets | Peninsula-Silicon Valley |
| Secretary | Mike Van Roy | Peninsula-Silicon Valley |
| Treasurer | Robert Hulin | East Bay - NC |
| VP Administration | Sherry McCormick | Reno |
| VP Education | Scott Berry | Reno |
| VP Membership, Marketing, & Public Relations | Richard Maas | Redwood Empire |
| VP Communications | Gail Bergunde | Diablo Valley |
| VP of Young Professionals | LuAnn Klann | Central California |
| Regional Directors | | |
| | Linus Li | Sacramento |
| | Trudia Pauley | Central California |
| | Ross Kawano | Hawaii |
| | Jack Karbens | Hawaii |
| Support Members (Appointed) | | |
| Education Support: REST | LuAnn Klann | Central California |

Education Support: FMN

Tricia Scalzo

East Bay - NC



Golden West Council Quarterly Meeting

DATE: August 27, 2016

LOCATION: Folktale Winery & Vineyards
8940 Carmel Valley Rd,
Carmel-By-The-Sea, CA 93923

COSTS: \$10.00 per person

TIME: 10:00 AM - 2:00 PM (if calling in - Please arrive 10 Minutes early to ensue connectivity)

Computer: <https://global.gotomeeting.com/join/711440261>

Telephone:

Dial +1 (646) 749-3122

Access Code: 711-440-261

Note: Note the GWC Council Meetings open to all IMA Members.

Please contact Patricia Mayer (pattmayer@earthlink.net) if you wish to attend.

BOARD MEMBERS: Please provide summary reports to [Patricia Mayer](#) and the [Webmaster](#) no later than August 20, 2016.



Chapter Corner

If you have something exciting about your Chapter email the information to Robert Hulin and it will be added to the Chapter Corner. This is each Chapters opportunity to share with other Chapters and Members.



CMA Recognition:

| Name | Chapter | Date |
|--|----------------------------------|------------|
| CMA's | | |
| Mr. Courtney David Jones, CMA | Peninsula-Silicon Valley Chapter | 04/06/2016 |
| Mr. Anton B. Guenachkov, CMA, CGA, CIS, CCP, CDP, CPLP | Peninsula-Silicon Valley Chapter | 04/02/2016 |
| Miss Maria Zyatikova, CMA | Reno Area Chapter | 04/29/2016 |
| Mr. Mr. Zhifeng Hong, CMA | Hawaii Chapter | 06/29/2016 |



Chapter Competition 2015-16 Final Standings: April 30, 2016

Chapter competition is directed principally toward stimulating chapters to promote the Institute's objectives by providing a broad spectrum of activities and service to members. The three major objectives of the chapter competition are:

1. Establishing good performance standards through a constant appraisal of point values and balance of competition activities by the Member Relations Committee.
2. Measuring actual performance against the IMA Competition standards as evidenced in the reporting activities and point awards reflected in the competition monthly standings.
3. Awarding incentives such as trophies, banners, and awards for excellence in planning, performance, and reporting of chapter activities.

This competition is credited with fostering a remarkable *esprit de corps* and *kinship* among chapters and individual members. Historically, the competition has been considered and continues to be a sound and basic influence on the continued growth and advancement of the IMA.

Currently, there are 79 Chapters in the Stevenson Division and 73 Chapters in the Warner Division that are in the Competition.

| Name | Place |
|------------------------------------|-------|
| Stevenson Division | |
| East Bay - Northern California | 31 |
| Peninsula-Silicon Valley | 74 |
| San Francisco | 58 |
| Warner Division | |
| Central California | 59 |
| Diablo Valley (Not in Competition) | |
| Fresno | 66 |
| Hawaii (Not in Competition) | |
| Redwood Empire | 46 |
| Reno | 07 |
| Sacramento | 50 |
| Stockton | 11 |



Chapter Competition 2016-17 Standings: May 30, 2016

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| Name | Place |
|------------------------------------|-------|
| Stevenson Division | |
| East Bay - Northern California | 28 |
| Peninsula-Silicon Valley | 37 |
| San Francisco | 48 |
| Warner Division | |
| Central California | 4 |
| Diablo Valley (Not in Competition) | |
| Fresno | 37 |
| Hawaii (Not in Competition) | |
| Redwood Empire | 11 |
| Reno | 13 |
| Sacramento | 66 |
| Stockton | 73 |



REST 2017 Scholarships

In 2015-16 the GWC/PNW REST Committee presented to Rosemary Davis of Nevada and Christian Edoria of the East Bay - Northern California Chapters, \$450.00 Scholarships towards the attendance to the 2016 REST.

Any chapter member may apply for this scholarship. Chapter Members should complete the REST Scholarship Application and email the application to:

Scholarship Committee
Golden West Council of the
Institute of Management Accountants
C/O: Scott Berry
Golden West Council VP Education
scottberry8@yahoo.com

Two scholarships will be awarded for REST 2017 with a maximum of one scholarship per IMA Chapter. The scholarship covers the cost of the REST event. Any travel, meal and hotel costs would be the attendee's responsibility.

Scholarships are limited to IMA student or regular members. Weights are given to young professional IMA members that would like to attend REST but do not have the financial resources to attend. Selection criteria includes IMA members that the chapter board members think might become an active chapter board member in the future, or are already an active chapter board

member. CMAs are given added weight in the selection process and then IMA members contemplating CMA certification are duly-weighted. Financial constraint is a driving factor, with additional consideration given to job loss. The scholarship is limited to once in a lifetime.

[REST Scholarship Application](#)



REST 2017
Atlantis Hotel & Casino
February 09-11, 2017

The Golden West Council and the Pacific Northwest Council of IMA, representing 28 chapters in eight states, is pleased to present the premier educational event in the Western U.S. - REST 2016. This annual two and a half day program celebrates over 20 years of high quality, leading edge programs geared to accounting and finance professionals. Prior year attendees have been impressed with the quality of topics and speakers, combined with a low cost destination served by airlines, and offering low cost transportation. This type of seminar is an excellent opportunity for both business and personal networking not available through other CPE delivery mediums.

This program allows participants to select topics that directly influence their day-to-day professional lives. Topics are designed to provide attendees with practical knowledge that can be used to enhance future performance. Participants may select from topics that will offer the greatest benefits based on where they or their companies currently are, or wish to be. Participants may select course from either the Managerial or Accounting track, or take some classes from both, you do not have to select all from the same track. In addition, there will be a special track one day in which attendees will participate in an audit. More information to follow.

Registration material will be located on the Golden West Council website at www.goldenwestcouncil.imanet.org.



IMA Accounting Honor Society

On January 9, 2015 IMA® announced the launch of the new IMA Accounting Honor Society (IAHS), designed to support and acknowledge high-performing accounting students attending accredited colleges or universities around the globe.

IAHS is open to junior and senior students majoring or minoring in accounting, finance or IT with a 3.0 or higher Grade Point Average overall and in accounting. In addition, students must be nominated by a professor or provide proof of meeting eligibility requirements in order to be accepted into IAHS.

Dr. Raef Lawson, CMA, CPA, IMA vice president of research and

professor-in-residence, unveiled the initiative at the American Accounting Association 2015 Management Accounting Section Midyear Meeting in Newport Beach, CA.

"As we continue to attempt to solve the skills gap in accounting and finance, it's important that we recognize high-performing students who are poised to embark on successful careers in accounting," said Lawson. "Through this honor society, we hope to encourage their career aspirations and offer opportunities for professional development."

As part of IAHS membership, those recognized will receive a Certificate of Recognition, a graduation chord, digital badge recognition, access to a members-only LinkedIn group and more. Students pay a one-time fee of \$50 for lifetime membership.

IMA began accepting applications in March 2015. For more information about IAHS, please visit www.iahs.org.



IMA Conferences

IMA's 17th Annual Student Leadership Conference in Detroit, Michigan November 10-12, 2016

It's time to think differently and create your own opportunity for career success. In this age of social networking, there is nothing online that has yet to replace the importance of meeting people in person. Join IMA at its 16th Annual Student Leadership Conference and learn how to position yourself for future success.

Students will have an excellent opportunity to network with accountants and finance professionals, fellow students, and educators from across the country. Learn from leading experts about career opportunities, the value of the Certified Management Accountant (CMA®) certification, ethics, business etiquette, leadership, job search techniques, and more. The Conference agenda is currently in the planning stages and will once again feature leading practitioners and professors as presenters.

Don't be left out. Check out the IMA Student Conference Webpage. [Click Here](#)

IMA's 98th Annual Conference & Exposition in Denver, Co June 17-21, 2017

Plan now to attend IMA's next conference and create your own magical opportunity.

Demonstrate to your employer that you are committed to the highest levels of professionalism, willing to take on new challenges, and eager to stretch beyond your current responsibilities by building valuable skills and knowledge to improve performance immediately. Earn 30+ NASBA-approved

CPE while sharing your future through highly focused educational sessions, panel discussions, and inspiring discussions with the profession's leaders.

Don't be left out. Check out the IMA Annual Conference Website: [Click Here](#)

We hope that this newsletter is informative about upcoming events within the Golden West Council. Again, if you have an article that you would like to share with the membership, please submit to the GWC VP of Communications at ima.goldenwestcouncil@gmail.com.

IMA is the association dedicated to empowering accountants and financial professionals in business to become "trusted business advisors" by playing an active role in their organizations' business success. With a network of about 60,000 professionals worldwide, IMA provides a dynamic forum for professionals to advance their careers through Management Accountant (CMA) certification, professional education, networking, and advocacy of the highest ethical and professional standards.

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.