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IMA 2022 Accounting and Finance Conference



The CMA is the fastest growing accounting certification and provides many benefits. Among those called out by our current CMA's are:

1. Sharpening time management skills in balancing a full-time job, with family, church, and life in general with the time it takes to study and do the work.
2. The benefit of learning new skills and being exposed to the study options available. Makes one "think outside of the box" and consider new and different possibilities.
3. Adding another tool, skill, accomplishment that will assist in the future - aiding in things like promotion, increases, and recognition.
4. Basically, a much better understanding of cost accounting as well as project analysis to ensure that we are receiving the expected benefits from the implementation of the projects.
5. Knowledge is power, and the CMA is definitely a powerful and comprehensive tool to gain that competency.

If you are interested in finding out more about the CMA program, contact Jim Kaylor at [jim.kaylor@perdue.com](mailto:jim.kaylor@perdue.com) or (443) 235-8731 and he will be happy to set up some time to walk you through the requirements and benefits in more detail.

### Your IMA Chapter Board

*President:* Jesse Reid, MBA, CPA

*Past-President:* Bill Perry, CPA, CMA, CFM, CSCA, CAPP, CGMA

*Treasurer:* Lorie Phillips, MBA, CPA, CIA, CIDA

*Secretary:* Kate Reinert, MBA, CMA

*VP of Professional Education:* Sue A. Cooper, PhD, CMA

*VP of Membership:* Christina Burke, MBA, CPA

*VP of Communications:* Kimberly Jacko, MBA

*VP of CMA Awards:* Jim Kaylor, MBA, CMA

*VP of Young Professionals:* John Muto, CPA

## President's Message



Jesse Reid, CPA, MBA  
Delmarva Chapter President

Hello again! Happy Spring! Welcome to the Delmarva Chapter of the Institute of Management Accountants. We have a great Board of Directors that have committed to providing you with quality continuing professional education and a rewarding networking environment. Your Delmarva board continues to work planning CPE events that we believe will be interesting and beneficial for your continuing education. If you have any CPE ideas you would like to see offered in the future, please contact a board member. Together we will make our local IMA chapter the best for professional education and networking. Make sure you continue to check the events & education section on our website for updates. If you would like to find out more about our chapter or about becoming a member, we encourage you to contact us by clicking [here](#) to get to our website.

### Who are we and what do we do?

The Delmarva Chapter of the IMA is a non-profit organization committed to providing educational, networking, and leadership opportunities to accounting professionals on the Delmarva Peninsula. We welcome accounting professionals from industry, public accounting, and academic fields.

The mission of our chapter is to promote accounting knowledge, provide educational opportunities, and serve the community through:

- Chapter meetings that include speakers on relevant accounting, tax, and business topics.
- Providing low cost continuing education programs for members and non-members.
- Supporting nearby IMA student chapters by providing speakers and inviting student members and faculty advisors to Delmarva Chapter functions.
- Partnering with other organizations to sponsor educational programs.
- Soliciting ideas from other chapters and the National Organization on effective programs.
- Using chapter funds when available to support scholarships and educational activities.
- Promotion of the Certified Management Accounting program.
- Providing volunteer accounting and tax expertise in the community to individuals and small businesses.
- Providing professional networking opportunities for members.

Jesse Reid, CPA, MBA  
Delmarva Chapter President



## Awards, Recognition, and Plain Great Stuff!

### IMA Milestone Membership Anniversaries

Dana Yates – 20 years on 04/08/2002



Charles Boster – 10 years on 05/29/2012

### 2022 New CSCA (Certified in Strategy and Competitive Analysis) License

Bill Perry – May 2022

### 2021-2022 New CMA Licenses

Michael Lassaline – August 2021

Christie Jensen – November 2021

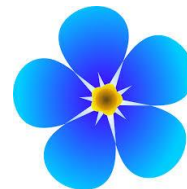
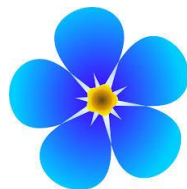
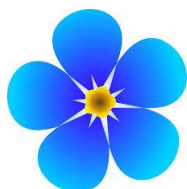
Rita Mecca – January 2022

Nathan Jusko – April 2022

### Recent Educational Achievements

We do have members actively working on educational achievements.

Please submit any completions that may have been missed.



*If you would like to share any “Plain Great Stuff” in the next Dispatch, please email [Kimberly.Jacko@perdue.com](mailto:Kimberly.Jacko@perdue.com).*

## Delmarva IMA Chapter Annual Meeting

Submitted by Kimberly Jacko, MBA, IMA Member Since 2015

Every March, the Delmarva IMA Chapter holds its annual meeting to update and query members on what's going on and what they may like to see in the future. We also vote on the board of directors for the next year and offer cutting edge CPE. While the CPE event was cancelled due to the unprecedented times, the meeting went forward. If you have any ideas any time of the year, please feel free to share with any of the board members below!

The Election results are in! Your current board for the 2022-2023 year will be:

***President:*** Jesse Reid, MBA, CPA

***Past-President:*** Bill Perry, CPA, CMA, CFM, CFCA, CAPP, CGMA

***Treasurer:*** Lorie Phillips, MBA, CPA, CIA, CIDA

***Secretary:*** Kate Reinert, MBA, CMA

***VP of Professional Education:*** TBD

***VP of Membership:*** Christina Burke, MBA, CPA

***VP of Communications:*** Christie Jensen, CMA

***VP of CMA Awards:*** Jim Kaylor, MBA, CMA

***VP of Young Professionals:*** John Muto, CPA

### Dispatch Submissions

If you have a submission for next quarter's Delmarva Dispatch, please submit it by

**06/30/2022** to

[Kimberly.Jacko@perdue.com](mailto:Kimberly.Jacko@perdue.com).

### Connect with Us



# UPCOMING EVENTS

## Delmarva IMA Chapter

- 07/28/2022 - July In-Person Event - To Be Announced

## IMA Inside Talk Upcoming Webinars

- 05/25/2022 - Intelligent Planning Today and Beyond
- 06/02/2022 - How Finance Teams Can Become Great Stewards of Company Data
- 06/08/2022 - You Survived Your IPO...Now What?

## Strategic Management Upcoming Webinars

- 05/23/2022 - Be Strategic! Enhance your Decision-Making Skills with CSCA

## IMA Leadership Academy Upcoming Webinars

- 06/07/2022 - Storytelling Skills for Management Accountants

## IMA Faculty Friday Upcoming Webinars

- 06/03/2022 - Dilemma at Ground Zero - 2022 Carl Menconi Case Competition Winner

## CMA Candidate Upcoming Webinars

- 06/06/2022 - Upskill with the CMA





# Delmarva Chapter IMA Joint Meeting with Students from Salisbury University: Internships in the COVID-19 Era

Submitted by John Muto, CPA, IMA Member Since 2017

The Delmarva IMA Chapter held its annual joint event with the students from the Salisbury University Chapter on Thursday, March 3<sup>rd</sup>. John Muto hosted an event which brought together interns from across public and private companies to share their experience and helpful tips and advice about impacts to their internship experiences due to the COVID-19 pandemic.

## Panel Discussion Cast

The **expert** in anything was once a **beginner**...

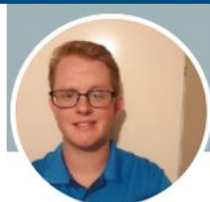
Da (Katie) Jang



- Perdue Farms Intern turning Associate (Jun 2021 - Current)
- Salisbury University 2019-2022, Accounting & Info Sys
- Salisbury University 2013-2014, Painting-Fine Arts

Da.Jang@perdue.com

David DiGrazio



- Perdue Farms Intern (Jun 2021 - Jan 2022)
- Salisbury University 2019-2022, Accounting, Fraud Certificate Program
- Wor-Wic Community College 2018, Business Associates

David.DiGrazio@gmail.com

Lindsey Behrman



- KPMG Intern (Jun 2021 - Current) and Campus Ambassador
- Salisbury University 2018-2022, Accounting & Info Sys, Music minor
- Student Business Leader and President of Beta Alpha Psi (Iota Pi Chapter)

LBehrman1@gulls.salisbury.edu

Paula Schaffer



- RSM Intern (Jun 2021 - Current) and Campus Ambassador
- Loyola University 2018-2022, Accounting, Finance
- Starting full time in the assurance practice at RSM

PSchaffer@loyola.edu

Jack Sutherland



- Lombardo Ayers & Company Intern (Dec 2021 - Current)
- Salisbury University 2017-2021, Accounting
- Salisbury University 2021-Current, MBA

JSutherland@lombardoayers.com

Most of the attendees for this event were students, as intended, but the discussion ventured into areas far past their academic experience. While an internship's environment and circumstances may have changed as a result of the pandemic, it was evident that the panel participants continued to stress the age-old importance of communication, trust, honesty, and hard work.

# Let's Talk About Fraud

Submitted by Cole Messick, IMA Member Since 2017

On Thursday, March 17<sup>th</sup> the Delmarva IMA chapter along with Perdue Farms, Inc. a virtual fraud webinar worth 4 credit hours. Joselin Martin, founder and chief consulting CFO of True North CFO, facilitated with approximately 25 people in attendance.

The seminar covered the three major learning objectives:

1. Reviewed the Fraud Landscape in 2022.
2. Examined the COSO Internal Control Framework.
3. Identified your organization risks.

Joselin evaluated each learning objective by using fictional and non-fictional scenarios of how fraud takes place in the real world. She also covered topics such as internal controls, the fraud triangle, and ethics. The seminar was informative, thought-provoking, and a great learning experience for all who attended.



Joselin Martin is the founder and chief Consulting CFO of True North CFO. She grew up in a family construction and real estate business and knows what it is like to never be able to leave work at the office. Most recently, she worked for an international construction subcontractor as its Chief Financial Officer, retiring after 20 years.

Joselin worked for a major accounting firm to get her CPA experience, but even there, she specialized in entrepreneurial businesses. She has continuously worked in private business ever since, with a short break in academia when she was a visiting assistant at the University of South Florida. True North CFO has given her the chance to return teaching, combining her academic and business experience to help other professionals in their lifelong learning journey.

Joselin is committed to all areas of the accounting profession, and her volunteer work includes board participation at the MACPA, AICPA, CGMA, and CCIFP. She has also moved to the international aspect of accounting as the Deputy Chair of the Professional Accounting Organization Development and Advisory Committee of IFAC.

She is active in the construction industry, serving on CFMA, CFMA Maryland, and ASA Baltimore boards. Joselin also participates on the CFMA Suicide Prevention Committee to increase the conversation around mental health in the industry.

When she's not joining Zoom calls or attending in-person events, Joselin enjoys her covid garden, running, and trying her husband's gourmet cooking.



## Embracing the Future – *Together!*

Join friends, experts, and peers from around the world at IMA's Accounting & Finance Conference as we reimagine the future of accounting and finance success and the best way to get there together.

IMA understands macroeconomic events are impacting personal and business finances. In keeping with our spirit of compassion over commercialism, we are extending our Early Bird in-person rates to make it more affordable to attend our Conference in Austin.

### Be Inspired

Discover new ideas, insights, and opportunities that turn up when experts share their knowledge.

### Learn

Customize your schedule with deep dive workshops and specialty tracks.

### Connect

Share experiences and build lasting relationships with other innovators and leaders.