Dear Members of the Stuart Cameron McLeod Society,

I hope you had a wonderful autumn season, and enjoyed Thanksgiving or other holiday events with friends and family. SCMS has been very busy since the IMA annual conference in June. We have held our annual Mid-Year conference in San Antonio and awarded the SCMS scholarship at the IMA Student Leadership conference in St. Louis.

The board of governors held its meeting immediately preceding the Mid-Year conference on October 21, 2018. We had 26 attendees at the meeting, including 5 on the phone. Some of our Governors were attending the IMA Board of Regents meeting and joined us later in the day for the conference. Alex Eng and Ginger White gave the IMA global update and participated in the meeting. Each SCMS Committee Chair discussed their goals and plans for the year. We voted to make a donation to the IMA Century Fund, to honor the passing of past SCMS President, Charlie Stewart, as well as funding for the Conference Scholarship winners to attend the SCMS annual dinner at the IMA conference.

Our Mid-Year conference was a success due to the hard work of SCMS board of governors, IMA staff LeighAnn Tobia, Denise Lauria, and Nametha Pawliczek, and the wonderful speakers. The hotel Contessa was at a great location on the Riverwalk. We were able to avoid the rain and toured the river beginning with a group picture on the boat. Please see pictures on the website as well as later in this newsletter.

I was very pleased with the quality of the speakers at the conference. From our very own Bud Kulesza who kicked off the conference on Sunday with a talk on Ethical Leadership, to the wonderful speaker from Deloitte, Kathryn Schwerdtfeger who spoke about Embracing Disruption and the work she was doing restoring Puerto Rico, from avoiding bankruptcy to redesigning the power grid, and the compassionate work done by David Marquez of the Bexar County Economic and Community Development department, we were off to a great conference. Dana Forgione, a popular professor at the University of Texas at San Antonio, gave an entertaining and frank presentation on the state of our economy, national debt and healthcare. We also heard from Todd Burchett from BKD CPA’s on Data Analytic tools to detect Fraud, and Erica Love and Zach Fleming from Ryan LLC who described all the interesting facts about the effect of the WayFair decision on online sales and other tax particulars in Texas. The weather held up again when we toured the Japanese Tea Garden and Missions. We also took a group picture in front of the Alamo, holding the SCMS banner.

I had the honor of presenting the SCMS Scholarship to Luke Harris, of the Missouri State University at the IMA Student Leadership Conference in St. Louis on November 2, 2018. Many of you may have spent time with Luke at the IMA conference in June and at the SCMS annual dinner. He also was selected to participate in the Young Professionals Leadership Experience at the IMA board meeting in San Antonio. The St. Louis Student Leadership conference had 620 attendees, to whom I gave a speech about the history and purpose of SCMS. In addition to the scholarship, SCMS was the largest donor to support the conference. IMA Global Board of Directors Chair, Ginger White, acknowledged SCMS’s support and scholarship at the very beginning of the conference.

As we approach the end of the calendar year for 2018, please consider the SCMS Scholarship Fund in your donation plans. 100% of the donations go directly into the SCMS Scholarship Fund. Some of our prior winners are now on the SCMS board of governors or recently joined SCMS. While there are many needs in the community, the SCMS Scholarship Fund as part of your IMA donation plans, can make a huge difference in the lives of the next generation of financial professionals. No amount is too small and every amount is appreciated.

As the holiday season nears, I want to send warm and heartfelt wishes for good health, close family, and prosperity in the year to come. SCMS is with you every step of the way through life’s journeys.

Sincerely yours,

Susan E. Bos, CMA, CPA, CFE
President SCMS 2018-2019
No trip to San Antonio is complete without seeing the Alamo!

An SCMS contribution to IMA’s 100th anniversary celebration with a Riverwalk boat ride.

Some of the excellent speakers from the conference with SCMS participants and President Sue Bos.

It’s always lots of fun in the hospitality suite!

The Hotel Contessa was a wonderful setting for the Mid-Year Conference!
Do you know an IMA member who should also be an SCMS member?

To qualify for SCMS membership, an IMA member must be a current or past Regional Vice President, Regional Council Officer, IMA Officer, IMA Committee Member, or Voting Member of the IMA Board of Directors.

The Board of Governors recently revised the process so that SCMS membership is now effective upon approval of the application by the SCMS Executive Committee. New members will want to experience the formal induction ceremony at an SCMS event, but now won’t have to wait until then to enjoy the benefits and prestige of SCMS membership immediately.

To join SCMS, contact Member Services at ima@imanet.org or 800-638-4427 or download the SCMS application from the SCMS website.

Visit the SCMS website at http://scms.imanet.org/

Congratulations to our latest SCMS inductees:

Karen Banks  Houston  8/3/18
Laurie Burney  Dallas  8/3/18
Nancy Hudnall  Dallas  8/3/18
Kay McDonald  Dallas  8/3/18
Tanya Tnirllall  Houston  8/3/18
Russell Tuncap  Houston  8/3/18
Jessica Pelini  Dayton  9/8/18
Jan Werner  Houston  9/8/18
Luke Harris  Missouri  10/21/18
Lesley Swain  Dallas  10/21/18

Congratulations to Luke Harris, our latest SCMS Scholarship Winner!

From left to right: Ginger White, IMA Global Chair; Luke Harris; Sue Bos, SCMS President

Congratulations Narnesha on the birth of your son, Nicholas. Isn’t he a cutie?

We have no doubt Nicholas is strong like his mommy!
IMA has negotiated a special group rate of $229 per night, single or double occupancy, exclusive of applicable state and local taxes (132.5%). Complimentary in-room internet will be available for all guests booked in the room block. The hotel is currently accepting reservations. To make reservations by phone, please call 1-866-996-6338 and ask for the IMA Winter Board of Directors Meeting or Booking ID 63007 or www.ReservationCounter.com to make reservations online.

The group rate is active until January 24, 2019 and is based on a first come, first serve basis so make your reservations as soon as possible. Reservations made after January 24th or after the IMA block of sells out may be subject to a higher rate.

Transportation information follows on the next two pages.
** Airlines: **

IMA has partnered with various airlines to provide attendees with flight discounts to Orlando (MCO) airport.

➤ **United:**

We have partnered with United Airlines to offer travel discounts for IMA’s Winter 2019 Board Meeting. [Click here](#) enter **(Z CODE: ZFSK228772)** in the “Promotions and Certificates,” box.

You may also call United Meeting Reservation Desk at 800-426-1122 Mon-Fri 8am – 10pm ET and Sat/Sun 8am – 6pm ET. Booking fees are waived for Meeting reservations.

*Please note that travel must be booked between February 10-23, 2019 in order to receive the discount.*

➤ **Delta:**

Delta Air Lines is pleased to offer special discounts for IMA’s Winter 2019 Board Meeting. Please [click here](#) to book your flights! Please enter the **NY2F7** in the Meeting Event Code Box.

*Please note the following:

**NOT ALL FARES ARE ELIGIBLE FOR A DISCOUNT**

- Discounts apply to round trip travel only
- Not valid with other discounts, certificates, coupons or promotional offers
- Fare rules will determine eligibility

You may also call Delta Meeting Network at 1.800.328.1111* Monday–Friday, 7:00 a.m. – 7:30 p.m. (CT) and refer to Meeting Event Code.

*Please note there is not a service fee for reservations booked and ticketed via our reservation 800-number*

** The valid dates for this discount are February 8-20, 2019 **
Transportation from (MCO) to Rosen Shingle Creek:

➢ **Taxi**
The Rosen Shingle Creek is approximately **11.4 miles (approximately 15 minutes)** from the Orlando Airport. The estimated taxi fare from the Orlando Airport is approximately $45-50.

➢ **Uber and Lyft**
Uber and Lyft are on-demand car service that allows you to request private drivers through applications for iPhone and Android devices. The service utilizes dispatch software to send the nearest driver to your location. Don't be fooled into thinking this is some sort of shared ride or cab service – Uber/Lyft will send you a private taxi-style car. The service provides a cashless solution that charges your ride directly to the credit card on file with your account.

Uber/Lyft rates from the Orlando airport to the Rosen Shingle Creek are approximately $35-50 (Depending on availability). To download Uber/Lyft, please visit your App Store or Mobile Market on your mobile phone. After you download the app, you will need to create an account. You will be asked to create an account. Uber will need your name, mobile number, email, language, and billing information. Click the Sign Up button. Your account will be created and you will be sent an email confirming the creation of the account. You’re ready to start using the Uber/Lyft service.

To request an Uber/Lyft, simply click on the app icon. You will be asked to “Set Pick Up Location.” Simply enter the address that you would like to go to. Then click on “Set Pick Up Location.” An estimated rate will appear with how long it will approximately take the driver to arrive to you. No cash is required. It will use the credit card that you have linked to your account.

➢ **Super Shuttle**
Blue Van Shared Super Shuttle, $14.40 (one way), $28.80 round trip. 
[Click here](#) to make reservations, please click the link below:

*If the discount code is not prepopulated, please enter Q47EL in Discount Code box.*

Arrival instructions will be emailed once a reservation is completed. Travel must be booked between February 11-20, 2019.

➢ **Rental Car**

**AVIS:**
IMA has partnered with Avis Rental Car to provide our attendees. Please find an attachment that includes all pertinent information regarding the Avis discount or [click here](#) to make reservations online. If the discount code is not prepopulated, please input, **Y110052**, in the Discount Code field.

➢ **Parking Rates:**
Hotel will provide a 50% discount on daily self-parking. The daily rate will be $9.