Dear Members of the Stuart Cameron McLeod Society,

I am honored to serve as your President for the 2018-2019 Year. I follow in the footsteps of many great leaders that came before me and served our organization with integrity and commitment to the mission of the Stuart Cameron McLeod Society. In particular, I would like to thank Dana Collins, SCMS President, 2017-2018 for a great year. His calm and confident leadership continues to be an inspiration to me. Thank you also to the Executive Committee, Committee Chairs and Board of Governors for their dedication, service, and leadership.

We had a great time in Indianapolis at the IMA Annual Conference. The SCMS board meeting had record attendance with 40 or more attendees. The annual evening event at the Indiana Historical Society was elegant and well attended with nearly 100 attendees. Pictures for both events are on the Photo Gallery on the SCMS website. We also had a beautifully decorated hospitality suite with thankfully cool air conditioning and lots of space for our members to socialize overlooking downtown Indianapolis.

Our next Mid-Year Conference will be held immediately after the IMA global board meeting in San Antonio, Texas from October 21-23, 2018. We will be meeting at the Hotel Contessa, right on the Riverwalk. While we always have a lot of fun and fellowship in all we do in SCMS, I want to acknowledge that this is also an educational conference with 10 hours of CPE, including 2 hours of Ethics. We took special care to make sure to include relevant topics for certification CPE. There is a link to the hotel and conference registration right on our SCMS website. If your schedule does not permit you to attend, you can still purchase your very own SCMS Polo shirt, 2018 version, in a dark purple color this year. They are the available with the link on the SCMS website in the conference section.

An important mission of the Society is to support students. If there is room in your budget, please consider donating to the SCMS Scholarship Fund. Your donation will make a big difference in the lives of future accounting and finance professionals. If you know of a student in need of financial assistance, please encourage them to apply for an SCMS scholarship. There is a link to apply on our SCMS website.

SCMS will be celebrating its 85th year anniversary, since we began in 1934, along with IMA’s 100th anniversary celebration at the IMA Annual Conference in San Diego, California, June 15-20, 2019. SCMS will have its own logo celebrating its 85th year. We will share the celebratory logo with you in upcoming postings on the website. If it has been a long time since you’ve attended an annual conference, next year’s conference celebrating the 85th and 100th, would be a great one to attend.

There is a lot going on at SCMS, and we never forget our members. We appreciate each and every one of you. You positively contribute to the mission of SCMS with your continued friendships and renewal of your membership. If you would like to recommend a member to join, there is a link on the website.

Sincerely yours,

Susan E. Bos, CMA, CPA, CFE
President SCMS 2018-2019
Induction and Annual Dinner
Monday, June 18, 2018
Indianapolis, IN

Incoming President Sue Bos leading the Induction Ceremony procession

Former President Sheryl honoring outgoing President Dana Collins.

Inside the Indiana Historical Society exhibit: You Are There 1863: Letter Home from Gettysburg

Mark and Cathy Romboli enjoying the Colts football exhibit

Our view of Victory Field from the hotel

It’s been a great conference.

Our next adventures… San Antonio and San Diego!!!

Hope to see you all there!

2018-2019 BOARD OF GOVERNORS

Executive Board
President Sue Bos, Ann Arbor
Vice President Pat Wynn, Dallas Fort-Worth Area
Treasurer MaryValerie Reeves, Dallas
Fort-Worth Area
Secretary Sandra Brenner, Cleveland East

Governors – Term ending June 30, 2019
Diane Hewlett, AZ Valley of the Sun
Anne Leighty, Grand Rapids
Mitch Lenoil, Los Angeles Metro
Larissa Lowe, Moscow
Vicki Whitehead, Atlanta
LeRoy Pennock, Houston

Governors – Term ending June 30, 2020
Charlotte Elliott, Albuquerque
Cristal Breitbeil, Pikes Peak
Evan Scarbrough, Ann Arbor
Lydia Washington, New York
Peggy Brown, Austin
David Teets, Southwest Florida

Committee Chairs – Term ending June 30, 2019
Communications – Spotlight
Brenda Engel, Michiana
Communications – Website
Chris Mishler, Ann Arbor
Communications – Website
John Engel, Michiana
Membership and Recruiting
Tanya Shell, Dayton

Committee Chairs – Term ending June 30, 2020
Education – Sandy Giberson,
East Bay—Northern California
Events and Hospitality –
Kris Brands, Pikes Peak
Scholarships and Students –
Ashley Gibson, At Large

Volume 57, no. 1
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, Voting Member of 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
Induction Ceremony Monday, June 18, 2018
JW Marriott Indianapolis, IN

Dr. Curtis C. Verschoor, CMA, CIA, CFE, CPA, ChFC – Northwest Suburban Chicago Chapter

Fatema ElZahraa El Wakeel, CMA – United Kingdom Chapter

John G. Rogoz III, CMA, CPA, CGMA – Minneapolis Chapter

Daniel J. Harley, CMA – New York Chapter

Joseph D. Nycum – Michiana Chapter

Heather D. Nusbaum, CMA – Austin Chapter

Jennifer R. Kline, CMA – Louisville Chapter

Dr. Raef A. Lawson, CMA, CSCA, CPA, ACMA (India), CFP, CAE – North Jersey Shore Chapter

Alan J. Kreimer, CPA – North Penn Chapter

Danielle M. Whitted, CPA – Cleveland Chapter

Reinstated:

Rhonda Armstrong, Atlanta Chapter
Joseph Hornett, Indianapolis Chapter

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Joseph Hornett, Indianapolis Chapter
Plan to join SCMS this October in beautiful San Antonio, Texas for our annual Mid-Year Conference. We will have 10 hours of CPE which includes 2 hours of Ethics.

Topics include Disruption, Fraud & Data Analytics, the U.S. Economy and Healthcare, Ethical Leadership, and Taxes. We have speakers from Deloitte, University of Texas, BKD CPA’s, Ryan LLC, County of Bexar, and a former ITT Automotive executive.

In addition to the education, Riverwalk and spectacular views, we will enjoy the following activities:
► Cruise on San Antonio River with “GO RIO” tour charter (limited availability)
► Visit to the Buckhorn and Texas Ranger Museum including lunch
► San Antonio Grand Historic City Tour: Japanese Tea Garden, Mission Concepcion, Mission San Hose, and the Alamo (limited availability)
► Celebratory dinner at the hotel to end the Conference
► Ten hours of CPE, including 2 hours of Ethics

Online reservations are now available. See below and on the SCMS website.
Scms.imanet.org

Please see next page for additional information
Annual Mid-Year Conference  
October 21 – 23, 2017 – San Antonio, TX  
The Hotel Contessa  
306 W. Market Street, San Antonio, TX 78205

Registration Form – online

Registration Policies and Procedures:

Please complete your Registration Form online via the following link: [https://www.imaoonlinestore.com/personifyebusiness/SCMSMidYearConference.aspx](https://www.imaoonlinestore.com/personifyebusiness/SCMSMidYearConference.aspx)

Full registration fee includes: Sunday Breakfast, Box Lunch, CPE, Riverwalk evening boat ride (limited availability), Monday Breakfast, CPE, Lunch at Buckhorn Museum and Texas Ranger Museum; Tuesday Breakfast and CPE, Box Lunch on Bus, tour of Japanese Tea Garden, Mission Concepcion, Mission San Jose, and the Alamo (limited availability), Transportation back to the hotel, Closing Dinner at hotel, and Nightly Hospitality Suite.

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<th>SCMS Member</th>
<th># Participating</th>
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<td>First Time Attendee/Non Member Spouse/Guest (all activities)</td>
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Official 2018 SCMS Mid-Year Conference Polo Shirt – Reserve NOW to ensure you receive this unique shirt in your size.

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Total shirts ______ x $40 = $__________

Total payment $__________
Stuart Cameron McLeod Society
Annual Mid-Year Conference
October 21-23, 2018
San Antonio, TX

Hotel Information:

The Hotel Contessa, 306 W. Market Street, San Antonio, TX 48205, (210) 229-9222
Reservations available for stay beginning Saturday night October 20, 2018.
Please make your room reservations directly with the hotel. Cut-off date is September 20, 2018.
Booking: Call Reservations Department at 866-435-0900 or click here
https://reservations.travelclick.com/15294?groupId=2076108&hotelID=15294#/guestsandrooms
to access the group online reservations. Group rate is $219.00 plus 16.75% tax per night.
Group rates will be honored from September 20, 2018.

Confirmed Speakers/Topics

C.S. Bud Kulesza, Former IMA Chair, retired Senior Vice President ITT Automotive, – Speaking on Ethical Leadership.
David E. Marquez, Executive Director, Bexar County Economic and Community Development – Local Economy.
Kathryn Schwerdtfeger, Partner, Deloitte, - Embracing Disruption.
Dana Forgione, Professor, University of Texas, San Antonio - Speaking on the U.S. Economy and Healthcare.
Todd Burchett, Partner, BKD CPA’s - Speaking on Fraud and Data Analytics.
Erica Love, Principal, Sales & Use Tax; Zach Fleming, Principal, Property Tax Commercial; Ryan, LLC - Speaking on
What’s Hot in Texas – What you need to Know in Sales and Property Tax.

Registration Policies and Procedures:

Please complete your Registration Form online via the following link: https://www.imainlinestore.com/personifyebusiness/
SCMSMidYearConference.aspx

Registration must be received by September 20, 2018. Should you need to cancel your registration, request for refunds must be submitted
in writing by September 20, 2018 and will be honored subject to a $25 administrative fee. Please remember to cancel your room reservation
directly with the hotel.
Stuart Cameron McLeod Society
Annual Mid-Year Conference
October 21-23, 2018
San Antonio, TX

Activities

SUNDAY, October 21, 2018:
7:00 am – 8:00 am – Breakfast
8:00 am – 11:30 am – Board of Governors Meeting – Call in number will be provided. (Central Local time)
12:00 pm – 1:00 pm Boxed Lunch
12:00 pm – 2:00 pm Bud Kulesza speaker on Ethics
2:00 pm – 5:00 pm – Explore city on your own
5:30 pm – 6:30 pm – Tour on San Antonio River with “GO RIO” tour charter (limited availability),
8:00 pm – Midnight - Hospitality Suite

MONDAY, October 22, 2018:
7:00 am – 8:00 am – Breakfast
8:00 am – 12:00 pm – CPE
1:00 pm – 2:00 pm – Buckhorn Museum and Texas Ranger Museum and lunch
2:00 pm – 5:00 pm – Explore city on your own
Dinner on own
8:00 pm – Midnight - Hospitality Suite

TUESDAY, October 23, 2018
7:00 am – 8:00 am - Breakfast
8:00 am – 12:00 pm - CPE
1:00 pm – 5:00 pm – Grand Historic Tour including Box Lunch, pick up at hotel (limited availability)
5:00 pm – tour to drop off back at hotel
6:00 pm – 9 pm – Celebratory dinner at hotel
9:00 pm – Midnight – Hospitality Suite

Nightly Hospitality Suite
**The hospitality suite will be closed Tuesday until the group returns from Celebratory dinner at the hotel **