Our meeting schedule for the 2019-2020 year has been set. The monthly Dinner Meetings take place on the second Tuesday of every month, except October will be the 3rd Tuesday of the month. Our first dinner is set for September 10, 2019. The cocktail hour begins at 6:00pm followed by dinner. Dinner programs (excluding FEY Event) qualify for 1 CPE credit.

The quarterly breakfast meetings will take place on the dates noted below, at RXR Building, 68 South Service Road, Melville. Light breakfast and networking begin at 7:45am followed by the seminar. Each session qualifies for 2 CPE credits and generally ends at 10am.

**ADVANCE PRICING & PAYMENT for Dinner Meetings:**
$65.00 Members / $85.00 Non-Members, Preregister online: LongIsland.IMANet.org

Please note: there is a $10.00 additional door registration surcharge - so please register online

**Quarterly Breakfast Series**
(Breakfast meetings are FREE to Members, $25 for Non-Members)
- Tuesday, October 22, 2019 - Cyber Security
- Tuesday, January 28, 2020 - International Business & Tariffs
- Tuesday, April 28, 2020 - Robotic Processing Automation
- Tuesday, July 28, 2020 - Business Valuation, Succession & Exit Strategy

**Young Professional Events**
- 3rd Annual Young Professionals Bowling Mixer - Wednesday, October 16th, 2019 from 7:00 - 9:00PM
- Student Workshop and Networking Hour - Tuesday, November 12th, 2019 from 4:00-7:00 PM
- Young Professionals Workshop and Cocktail Hour - Tuesday, January 14th, 2020 from 4:30-7:00 PM

**Sponsorship Opportunities Abound!!!**
Sponsor a dinner, breakfast, newsletter and website - see page 6
A Message From The President

Dear IMA Friends,

As summer draws to a close, I want to welcome you to the 2019-2020 IMA LI Chapter year. Our Board has been working diligently over the last few months to prepare an exciting education calendar, filled with relevant topics and vibrant speakers. We are looking forward to our kick-off dinner meeting on Tuesday, September 10th at our new home for the year, the Westbury Manor, located at 1100 Jericho Turnpike, Westbury, NY. The CPE topic will be the Highs and Lows of the Cannabis Industry, and our panel of subject matter experts will include Neil Kaufman, Esq., Managing Partner of Kaufman & Associates, and Anthony P. Mariani, CPA, Partner at Sheehan & Co. The presentation should prove to be quite interesting, and as always, our cocktail hour will begin at 6:00pm featuring open bar and passed hors d’oeuvres. Dinner begins at 7:00pm.

Stay tuned for our monthly e-blasts announcing our future topics and meetings. However, mark your calendars now for our December 10th meeting when we will feature a Discussion on Fraud with the nationally renowned Pink Crime Lady, Kelly Paxton. Our quarterly Breakfast Seminars, good for two CPE credits each, will remain at our current location at the RXR Plaza at 68 South Service Road, Lower Level, Melville, NY. And October, November and January will feature events for our Young Professional and Student members.

Please contact our VP of Communication, Marcy Greenfield to be added to our email distribution list at communications@ima-longisland.org. And for sponsorship opportunities, please contact our VP of Sponsorships, Rod Ganis at sponsorships@ima-longisland.org.

In June, our Long Island Chapter was recognized at the IMA Annual Conference & Exposition with the prestigious Gold Medal for Community Service from the 2018-2019 ICMA Board of Regents. It was an honor and a privilege to accept the Gold Medal on behalf of our chapter, as well as to be acknowledged for being one of the top 25 chapters in the world for our Outstanding Level of Service.

And with that, my IMA friends I leave you with the immortal words of Frankie Valli and the Four Seasons, “See you in September!”

Best regards,
Justine M. Roe, CPA, MBA
President, IMA LI Chapter
In Memory of Milton Zipper

Milton Zipper, 102, accounting firm founder and Past President of the Long Island Chapter of the Institute of Management Accountants (formerly the National Association of Accountants), passed away on July 22 at his home in Naples, Florida.

In 1941, before the United States entered World War II, Milton answered an ad in The New York Times for an accounting job with Johnson, Drake and Piper Inc., a construction firm that did contract work for the military. In his capacity, he travelled to Brazil, South Africa, Massawa, Eritrea, on the Red Sea. He eventually found himself in Cairo with a title of Chief Accountant. In 1945, he took a two year contract with Price Waterhouse that saw him become a chief accountant at the company offices in Caracas, Venezuela. He quickly learned Spanish, which complemented his other spoken languages of Italian, French, Russian a bit of German and his native language of English, having been born and bred in Oyster Bay, Long Island. He went on to work not only in Venezuela, but in Panama, Colombia, Brazil, Argentina and Guatemala. In 1949, he started his own international accounting firm in Oyster Bay – Milton Zipper, CPA. In addition to his accounting career, Milton owned real estate with P. James Roosevelt, a millionaire philanthropist who was a cousin of President Theodore Roosevelt.

Milton, as one of his daughters noted, was ...” once nicknamed, “Honest Abe of the accounting field”, by people in the Federal government, and Milton didn’t know if that was a compliment or a complaint...” A 1954 article in Newsday, detailed how Milton helped uncover a scandal that led to the arrest of two Long Island based union representatives for misuse of funds. He noted to officials at the Union, that the accounting records were “incomplete, inaccurate and in the case of the welfare of pension funds, virtually nonexistent” – but said the official ignored his report and recommendations, eventually leading to the arrests.

In 1952, Milton became a member of the National Association of Accountants; now known today, as the Institute of Management Accountants (IMA). In 1958, he became President of the Long Island Chapter.

Through the years, he was very active as a Past President of the IMA, always sharing his wisdom, his expertise in various industries, and an anecdote here and there.

In 1988, Milton posed an idea at a Past President’s meeting, starting out with discussing honoring a local financial executive for their achievements on Long Island. His thoughts went on to discuss how, while Presidents of companies are always out of the office, giving speeches, or being honored by charities, etc....that someone was back at the headquarters, keeping the company “humming”. That someone was a Chief Financial Officer or a Financial Executive. So it began, that a conversation at a meeting of Past Presidents of the IMA, developed into The Financial Executive of the Year Award, for which the first award was given in 1989. Soon after the first award, the award was renamed The Milton Zipper Financial Executive of the Year Award, to honor one of the most prominent accountants, born and raised on Long Island.

We at the Long Island Chapter of the IMA are very saddened by the news of Milton’s passing; however, we are so thankful for having shared wonderful and inspiring years with him helping us grow in the Long Island community.

Milton Zipper and Edgar Schmidt
Institute of Management Accountants
Long Island Chapter Board Members 2019/2020

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Renee Sumpter, CPA .............................................................. Treasurer
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The IMA would like to Thank the following for being Sponsors this past year:

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A Special Thank You to this years Sponsors

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## 2019-2020 Sponsorship Program

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<tr>
<th>Package Description</th>
<th>Price</th>
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<tr>
<td><strong>Complete Package</strong> - Dinner Meeting (includes attendance for two at the event), E-Newsletter Sponsorship</td>
<td>$725</td>
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<tr>
<td><strong>Dinner Meeting</strong> - (includes attendance for two at the event)</td>
<td>$475</td>
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<td><strong>Value Dinner Meeting</strong> - Two Dinner Meetings <strong>(Each additional Dinner Meeting - $400)</strong></td>
<td>$850</td>
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<tr>
<td><strong>Breakfast Meeting</strong> - (includes attendance for two at the event)</td>
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<td><strong>Quarterly E-Newsletter &amp; Monthly E-Letters</strong></td>
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<td>Pkg #1 – Logo Ad &amp; ELink – All E-Newsletters for 1 Yr (4 issues)</td>
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<td>Pkg #2 – Logo Ad &amp; ELink - $25 each quarterly E-Newsletter</td>
<td>$_____</td>
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<tr>
<td>Pkg #3 – Logo Ad &amp; ELink - $25 each monthly E-Letter</td>
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<td><strong>Web Site</strong> - Logo Ad &amp; ELink – 1 Year</td>
<td>$250</td>
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Contact Name: ___________________________________________ Title: __________________________

Phone: __________________________ Email: __________________________

Company: __________________________

Address: __________________________

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**DINNER AND BREAKFAST MEETING SPONSORSHIPS SELL OUT FAST – PLEASE RESPOND ASAP**

Event sponsors receive dedicated space during the events networking hour and introduce their company and services directly to the audience with a short speech. For more information or to reserve a sponsorship spot at an upcoming event, please contact: Rod Gantis, VP of Sponsorship at sponsorships@ima-longisland.org or call (516)280-3999.

Please mail this form and check payable to **IMA LI Chapter** to: Institute of Management Accounts-LI Chapter, Attention Renee Sumpter, 408 Harrison Avenue, Miller Place 11764. To pay by credit card please go to: https://longisland.imanet.org/events/advertise

Thank you for sponsoring a program.
NEW MEMBERS

Send or bring a friend or business associate to an IMA meeting!

Your help is needed to keep our Chapter growing. Please submit the name of a prospective candidate who might be interested in IMA membership to our Vice President of Membership:

Eric Monroe
Standard Pension Services, LLC
emonroe@standardpensionservices.com
516-873-0090 x 204

YOUR NEWSLETTER EDITOR

Your newsletter editor is always looking for information about you and other chapter members, as well as significant issues concerning our Long Island community relative to accounting and business matters. Please forward all personal notes for possible inclusion in the newsletter to the editor:

Marcy Greenfield
c/o Berdon LLP
One Jericho Plaza
Jericho, NY 11753
(516) 806-3425
mgreenfield@berdonllp.com

REMEMBER TO PRE-REGISTER ONLINE

In our efforts to serve you better and to avoid long lines at the registration table, we encourage you to pre-register and pre-pay for breakfast and dinner meetings on our website: LongIsland.IMANet.org

Pre-registration closes 5pm the night before the event.
A $10.00 surcharge will be applied for registration at the door of the event.
IMA Long Island Membership Is For Everyone

By Eric Monroe, VP Membership

There are over 300 chapters of the IMA globally with 125,000 plus members. We are proud to say the Long Island chapter is one of the largest, nearing 400 members, and most active chapters in the country. In fact, our chapter was just awarded the highest honor for Community Service in the world. This is truly meaningful after coming in runner-up the last two years. Congratulations to everyone in the Long Island chapter for making this happen.

The Long Island IMA chapter meets the second Tuesday of each month, September to May, for an evening of networking and education. There are also four calendar quarter breakfast meetings where we do a deep dive on timely topics effecting todays businesses. Both offer CPE credits.

To take advantage of discounted rates for our events, we offer three levels of membership.

Professional:
If you’re on a career path as an accountant or financial manager in business, IMA can provide leading-edge resources to help you stand out in the crowd, broaden your knowledge base, sharpen your skills, and become a true strategic partner in your organization.

Student:
The IMA can help open the door to a dynamic career. As an IMA Student member, you can learn about the role of accountants and financial managers in business and explore your career options. IMA offers Student members access to many of the benefits of regular Professional members at a significantly reduced rate, including a robust mentoring program.

Academic:
The IMA provides special tools and resources for the professionals who are developing the industry’s future leaders. Academic members have access to our ethics curriculum, case studies, webinars, research grants, mentor program, and many other teaching resources.

From investing time and resources in our community to fast-tracking careers for graduating accounting students, educating financial professionals on the ever-changing landscape effecting todays businesses and attracting the highest caliber of service professionals looking to build long term relationships with our members, the IMA is for everyone.

Please visit our website, www.longisland.imanet.org , for details on upcoming events, membership details, information on our Certified Management Accountant (CMA) designation and other valuable resources. We are looking forward to seeing you, and your colleagues, at many of our upcoming events.
When I was in college, studying accounting at LIU Post, I would regularly attend the Accounting Society Meetings. One particular meeting stood out, when Marvin Rosen, VP of the Student Committee, visited our campus and discussed the IMA. He explained how there is a group here on Long Island for accountants that meet regularly and enjoy networking while learning and earning CPE. He extended an invite to a few of us to attend a dinner meeting, and helped me join as a student member. At this time, our school did not have an IMA chapter, and this was the first I was hearing of the CMA exam or the IMA organization. I attended my first event at the Milleridge Inn in April 2014 on Family Business and I really enjoyed it. I had attended events at other accounting or finance related organizations on Long Island here and there, but never found one to call home.

Fast-forward two years; I was now a first year staff at Baker Tilly. My Partner, and mentor, Lori Catapano, served as an IMA board member and encouraged me to become involved. I began regularly attending, and volunteering at the front desk. At times, I would feel like one of the youngest in the crowd, but that turned out to be beneficial. I built relationships then that have helped shape me into the professional I am today. I now consider many of my fellow IMA members to be mentors in my life, and I am grateful for the how the IMA has guided my growth.

I have had the unique opportunity to collaborate with Marla Leiman, fellow young professional board member, to create a young professional committee dedicated to outreach for people our age. Over the past two years, we have hosted four events tailored to networking and the early stages of an accounting and finance career. I am pleased to share that we have two incredible events planned this year, our Third Annual Bowling Mixer in October, and our Young Professionals Workshop In January.

If you have a young professional in your network that may benefit from becoming involved, please consider encouraging them to do so as I once was. I can assure you they will appreciate it. It is much easier to advance your career when you have people to look up to and guide you there.
3rd Annual Young Professionals Bowling Mixer

When: Wednesday, October 16th from 7 – 9 PM
Where: Bowlmor at 895 Walt Whitman Road, Melville NY 11747

Thanks to our sponsors, this event is completely FREE to attend!
Come join us for Fun, Food/Drink, and Networking.
Invite your peers! Please register in advance HERE. Space is limited.

Registration URL:
Click Here

Any questions, please contact:
Kristina_Swindell@yahoo.com

Thank you to our Sponsors!