



LONG ISLAND CHAPTER



Newsletter



The Association of Accountants and Financial Professionals in Business

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A Message from the President

The Summer has flown by so quickly, I hope you and your families are all keeping safe during these trying times. There are so many challenges to our daily existence..... our hearts and thoughts go out to the victims of the latest curve ball thrown by Mother Nature.... Hurricane Ida.

Our Board has voted to continue our evening meetings virtually through December 2021.

The health and safety of our members comes first, and although we miss seeing all of you in person, we know that this is currently the right decision. We will revisit the virtual vs. in person meetings at our November board meeting to determine the status of the 2022 meetings, and the decision will depend on the Covid situation as well as CDC recommendations.

Our educational calendar for the year has been completed, and our first meeting is September 14, 2021, via zoom. To Vax or Not to Vax: How Current Trends are Impacting the Work Force, will provide very relevant information to the world we are all living through now. This event will feature a panel consisting of Stephanie Curry of Sherwood Lumber, Henry Shapiro of Jackson Lewis P.C. and Collen Merlo of the Association for Mental Health and Wellness. Jeffrey Schlossberg of Jackson Lewis P.C. will guide the panel presentation.

As in the past, the September zoom meeting

will include our Virtual Networking prior to the meeting. These breakout networking rooms have worked well in the past with much positive feedback. It provides the ability to chat in groups of 4 - 5 people at a time, then move into a different group every 8 minutes. If you have not tried it yet, you should sign on early and give it a try!! It is nice to see old friends, meet new friends and socialize.

We have all been through a very challenging year. I would like to take this opportunity to thank our membership, guests, speakers and sponsors for their patience and cooperation, and our Board for stepping up to the challenge of reinventing the LI Chapter as a Virtual Educational and Networking Platform. We have attracted not only Long Islanders to our meetings, but we have had attendees from all over the Country! This attests to the quality of the topics and panels that we have, with your input, been able to compile and present.

I am looking forward to Virtually seeing everyone at our September 14th presentation.

Stay Safe.

Best Regards,

Marvin Rosen
President Long Island Chapter IMA

Meeting Schedule

Dinner Meeting Schedule 2021

| | |
|---|---|
| September 14, 2021 <i>Virtual event</i> | To Vax or Not to Vax: How Current Trends are Impacting the Workplace |
| October 12, 2021 <i>Virtual event</i> | Artificial Intelligence: The Impact of the Future Workforce |
| November 9, 2021 <i>Virtual event</i> | Accounting Firm Managing Partner Panel |
| December 14, 2021 <i>Virtual event</i> | Economic Update |
| January 11, 2022 <i>In-person</i> | CEO Panel |
| February 8, 2022 <i>In-person</i> | The value of business coaching (panel of business coaches) |
| March 8, 2022 <i>In-person</i> | Cyber Security and fraud |
| April 12, 2022 <i>In-person</i> | CFO Panel |

Quarterly Breakfast Series 2021-2022

| | |
|---|---|
| October 26, 2021 <i>Virtual Event</i> | PPP loans, employer retention credit and other government programs |
| January 25, 2022 <i>In-Person, location TBD</i> | Tax update |
| April 26, 2022 <i>In-Person, location TBD</i> | Understanding SPAC's |
| July 26, 2022 <i>In-Person, location TBD</i> | Business Insurance: how much do you really need? |

The Long Island IMA Chapter has been working diligently in planning and adapting around the COVID 19 pandemic to best help and serve our valued members and colleagues. We are monitoring communications from IMA Global as well as New York State and the CDC to plan future events in accordance with their guidance and restrictions.

Our priority still remains with our social responsibility for the safety of our members, speakers and colleagues. After performing our due diligence and with COVID-19 cases on the rise, we have determined to continue to conduct events in a virtual format through December of 2021 in order to ensure everyone's safety. We will continue to keep our valued members and colleagues informed if there any new developments or changes.

Our chapter has always been a strong supporter of our local community, thus our virtual events will be free of charge for members and only \$10 for non-members. We therefore ask you to pass this email on to your friends and co-workers who may be interested in this topic and in need of CPE credits.

Contact the following for information

Ayanna Newell, VP Membership

Please contact for membership inquiries
membership@ima-longisland.org

Carmela P. Borzelleri, VP of Communications

Please contact for newsletter submissions
communications@ima-longisland.org

Davi Tserpelis, VP of Sponsorship

Please contact for sponsorship opportunities
sponsorship@ima-longisland.org

Sponsorship Opportunities

At this time, more than ever, businesses are seeking ways to get their names out in front of the business community. Sponsorship allows our chapter to continue to serve our members with programs that are relevant in today's world. Each program session gives our supporters the opportunity to promote their companies to the Accountants and Financial Decision makers of Long Island's Business communities and across the Country.

2021-2022 Sponsorship Program

DON'T MISS AN OPPORTUNITY TO PARTNER WITH US FOR OUR UPCOMING 2021/2022 VIRTUAL AND IN-PERSON PROGRAMS OFFERING CPE CREDIT

We have sponsorship opportunities for our newsletter, dinner and breakfast events, and our website still available for you to promote your company to the Accountants and Financial Decision-Makers of Long Island's business community.

*******SPONSORSHIPS ARE FIRST COME, FIRST SERVE WITH INDUSTRY EXCLUSIVE*******

| | Virtual | In-person |
|--|----------|-----------|
| Complete Package - Dinner Meeting (includes attendance for two at the event), E- Newsletter Sponsorship #1, Web Site Sponsorship. | \$ 550 | \$725 |
| CFO, CEO and FEY Dinner Meetings - (includes attendance for two at the event) | \$ 275 | \$550 |
| Dinner Meeting - (includes attendance for two at the event) *excludes CFO, CEO and FEY dinners | | \$475 |
| ** Value Dinner Meeting - Two Dinner Meetings ** (Each additional Dinner Meeting - \$400) | \$ 500 | \$850 |
| Breakfast Meeting - (includes attendance for two at the event) | \$ 125 | \$200 |
| Quarterly E-Newsletter & Monthly E-Letters | | |
| Pkg #1 – Logo Ad & ELink – All E-Newsletters for 1 Yr (4 issues) | \$100 | |
| Pkg #2 – Logo Ad & ELink - \$25 each quarterly E-Newsletter | \$ _____ | |
| Pkg #3 – Logo Ad & ELink - \$25 each monthly E-Letter | \$ _____ | |
| Web Site – Logo Ad & ELink – 1 Year | \$250 | \$250 |
| TOTAL | \$ _____ | \$ _____ |

Contact Name: _____ Title: _____

Phone: _____ Email: _____

Company: _____

Address: _____

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: Davi Tserpelis-VP Sponsorship IMA Sponsorship Committee Member sponsorships@ima-longisland.org or davi.tserpelis@cnb.com or text/call (516) 655 - 7837

Please mail this form and pay online at <https://longisland.imanet.org/events/advertise> or mail check payable to Institute of Management Accountants, c/o City National Bank, attn: Davi Tserpelis, 425 Broad Hollow Rd, Melville, NY 11743.

Thank you for sponsoring a program.



Congratulations to our new Board

IMA Long Island Chapter Board Members 2021/2022

| | |
|---------------------|-----------------------------------|
| Marvin Rosen | President |
| Rod Ganis | Secretary |
| Ayanna Newell | VP Membership |
| Davi Tserpelis | VP Sponsorship |
| Donna Blanc | VP Administration |
| Frank Nardolillo | Treasurer |
| Marla Leiman | VP Meetings |
| Matthew Brown | Webmaster |
| Michael Valveri | VP Student Activities |
| Randy DeYulio | VP Employment |
| Richard Richer | CMA |
| Tom Rosenthal | VP Education |
| James Smith | Immediate Past President |
| Carmela Borzelleri | VP Communications, Past President |
| Adrienne Sinnott | Past President |
| Amy Abrie | Past President |
| Andrew Myerson | Past President |
| Arthur Sanders | Past President |
| Bob Arnold, Jr. | Past President |
| Gary Carpenter | Past President |
| Justine Roe | Past President |
| Lucy Mazany | Past President |
| Michele Yen | Past President |
| Neil Seiden | Past President |
| Rob Grote | Past President |
| Elizabeth Melillo | Board Member |
| Ellen Bartley | Board Member |
| Eric Monroe | Board Member |
| Gerard Luckman | Board Member |
| Ira Kantor | Board Member |
| Jeffrey Schlossberg | Board Member |
| Kristina Swindell | Board Member |
| Renee Sumpter | Board Member |
| Robert Steinberg | Board Member |
| Ron Goldman | Board Member |
| Steve Kuperschmid | Board Member |
| Stephanie Millner | Associate Director |
| Sophie Evans | Associate Director (Student) |
| Zhe Liu | Associate Director (Student) |



About Our Chapter

The Long Island Chapter of the Institute of Management of Accountants was chartered in 1951 by the then National Association of Cost Accountants (“NACA”). Over the years the name was changed to the National Association of Accountants (“NAA”) and now is known as the Institute of Management Accountants (“IMA”). Harold Nohe was the first President of the Long Island Chapter.

In 1970 the Long island Chapter was split into two Chapters, one in Nassau and one in Suffolk. The first President of the Suffolk Chapter was Paul Urban. The two Chapters co-existed until 1986. The two Chapters met the second week of the month with Nassau meeting on Tuesdays and Suffolk meeting on Thursdays. There were numerous members who attended both meetings.

In 1984 and 1985 both Chapters experienced a decline in membership and meeting attendance.

A committee was formed of Donald Green and Marc Palker from Nassau and Eric Perlman and Charles Schreiber from Suffolk. In 1986 with the permission of the National Office and the Board of Directors, the two Chapters were merged to reform the Long Island Chapter. Donald Green was the first President of the reformed Long Island Chapter.

In 1987 the Past Presidents met to decide how best to help the Chapter prosper and grow. From these meetings the Financial Executive of the Year Award was born with the first recipient being Sanford Weintraub, CFO of Independent Election Corp of America. This award still exists today and is named after the man whose idea became the finale of our Chapter year, The Milton Zipper Financial Executive of the Year Award Dinner.

As they say, the rest is history.....

About IMA

The Institute of Management Accountants (IMA) is the world's leading organization dedicated to empowering management accounting and finance professionals to drive business performance.

IMA members are today's leaders, managers, and decision makers in management

accounting and financial management. As members we are dedicated to continued professional development, to achieving the highest levels of professional certification, and to supporting each other in our commitment to professional excellence.

www.imanet.org

Join the IMA

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, 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.

Join the IMA to enrich your career! Becoming a member gives you access to tools, information and networks that will separate you from your peers.

From discounts and resources to obtain the CMA and CSCA designations to all important thought leadership, networking opportunities and community involvement.

For more details and discount codes visit or refer someone to our chapter website at www.Longisland.imanet.org/memberships . Remember to choose the Long Island chapter when signing up.

Call our Director of Membership for more information:

Ayanna Newell - anewell@bdo.com or (631) 927-1233.