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A MESSAGE FROM THE PRESIDENT

Dear Members:

It’s hard to believe that we are coming into April already. The spring weather and longer days are definitely a welcome change especially after having to cancel last month’s CEO Panel dinner meeting due to inclement weather. This wonderful program will be presented at our October 2017 dinner meeting. On April 11, 2017 our chapter will have the last regular dinner program of the chapter year prior to our Financial Executive of the Year program to be held in May. The April dinner program is on Social Responsibility which will cover trends in corporate reporting and the impact of technology on reporting and disclosure. I hope to see you there.

April is also the time for our annual Long Island Chapter Board elections. On page 3 of this newsletter you will find the nomination list of names approved by the nominating committee and approved by the Board of Directors. The membership vote will take place prior to our regular programming on April 11, 2017. Please contact me if you have any questions regarding this process.

I’d like to remind all of our members that the IMA Annual Conference is being held in Denver, Colorado from June 17-21, 2017. This conference offers 8 specialty tracks designed especially for the management accountant and includes over 65 educational sessions and an opportunity to earn more than 25 NASBA approved CPE credits. In addition to the educational benefit there participants have an opportunity to attend more than 15 networking events. For more information please visit the IMA Conference website at www.imaconference.org/

Happy spring!

Amy Abrie

April 11, 2017 MEETING

Woodbury Country Club
884 Jericho Turnpike, Woodbury, NY
Cocktail Hour begins at 6:00pm - Business Attire

Topic: Social Responsibility – in Corporate Reporting & Disclosure

Speakers:

Brad Monterio,
Managing Director,
ColcomGroup, Inc.

Liv Watson,
Sr. Director of Strategic Customer Initiatives, Workiva, Inc.

Moderator: Marc Palker

For more information and to register for the event, please visit our website at http://longisland.imanet.org
Quote

“Earth laughs in flowers.”

- Ralph Waldo Emerson

Gleim Discount on CMA Study Material

The Long Island IMA Chapter has partnered with Gleim to ensure your success on the CMA exam!

The Gleim CMA Review has the largest exam-emulating test bank of multiple-choice and essay questions, our popular CMA exam instructional videos, and a no-hassle Access Until You Pass® guarantee. Gleim has over 40 years of success helping candidates pass the CMA exam.

Place your order directly online by going to https://www.gleim.com/IMALongIsland or contact Melissa Leonard at 800.874.534 or lmazany@signatureny.com to learn about the significant discounts you are eligible for as an IMA Chapter member.

2017 Dinner Meeting Schedule

May 9, 2017
Annual Financial Executive of the Year (FEY)

Quarterly Breakfast Series

July 25, 2017
Forensic Accounting

Meeting Times

Please note the dinner meetings at The Woodbury Country Club at 884 Jericho Tpke, Woodbury, NY will now take the following format:

6:00pm to 7:00pm - Registration & Professional Networking
7:00pm to 7:30pm - Dinner Served
7:30pm to 8:30pm - Speakers / Q&A / Wrap Up
IMA Announces Virginia (Ginger) R. White, CMA, as Fiscal 2017-2018 Chair-Elect

IMA® (Institute of Management Accountants) is pleased to announce that Virginia (Ginger) R. White, CMA, has been named Chair-Elect for IMA’s fiscal 2017-2018 period (July 1, 2017 to June 30, 2018).

Ginger is currently the corporate purchasing finance director at Cummins Inc, a global power leader that designs, manufactures, sells, and services diesel and alternative fuel engines; diesel and alternative-fueled electrical generator sets; and related components and technology. Based in Columbus, Ind., Ginger supports Cummins global, direct, and indirect purchasing leaders with financial reporting and analysis, responsible for a $12B companywide spend. She has been employed by Cummins since 1997.

Currently, Ginger is serving on the IMA Global Board of Directors and is a member of the Planning and Development Board Committee. A member of IMA since 1999, she has held various positions on the Board of IMA’s South Central Indiana Chapter, including a term as president. She also served on the Lincoln Trail Regional Council, where she was the IMA student representative, chair of the student committee, regional vice president, and president. She previously served two terms as chair of IMA’s Member Relations Board Committee, a term as chair of IMA’s Performance Oversight and Audit Board Committee, a member of IMA’s Nominating Board Committee, and a member of IMA’s Governance Committee.

Ginger will assume the role of IMA Chair in fiscal year 2018-2019 and will be the organization’s fifth female to hold this position. In honor of International Women’s Day on March 8, Ginger encourages all women to #BeBoldforChange as they launch and cultivate professional careers.


The following slate of officers will be presented to the general members of the IMA Long Island Chapter for approval at the regularly scheduled dinner meeting to be held at the Woodbury Country Club on Tuesday evening April 11, 2017:

- Carmela Borzelleri, President
- Renee C. Sumpter, Secretary/VP Admin
- Randy Deyulio, Treasurer
- Donna Blanc, VP Education
- James Smith, VP Membership
- Joseph Giacinto, VP Communications
- Justine Roe, VP Sponsorship
- Marvin Rosen, VP Student Activities
- Janine Howe, Chair Employment
- Anthony Aronica, Board Member
- Ayanna Newell, Board Member
- Barbara Calissi, Board Member

- Eric Monroe, Board Member
- Linda McCormack, Board Member
- Lori Catapano, Board Member
- Marcy Greenfield, Board Member
- Marla Leiman, Board Member
- Michele Farrell, Board Member
- Rob Valli, Board Member
- Steven Kuperschmid, Board Member
- Thomas Rosenthal, Board Member
- Tom Fazio, Board Member
- Kristina Swindell, Board Member
- Michele Palazzolo, Board Member
IMA EMPLOYMENT SERVICES

Job Postings on the Employment Page of the IMA Website

By Randy DeYulio, VP Employment Services

The Employment Services Committee has continued to receive new job this past month and has listed a few of them on the IMA website under the Employment page. If you are interested in any of those positions, please reach out to me at employment@ima-longisland.org. The Employment page will be updated every other month or as dictated by new job openings, so if you are in transition, check out our website.

In addition to the positions posted on our website, we have a database which includes numerous job openings ranging from bookkeepers, internal auditors, and staff accountants to treasurers, controllers and CFOs. Some of our more recent postings include the following positions:

Virtual Bookkeeper position responsible for working with multiple clients, learning their businesses and optimizing their accounting workflow. A bachelor’s degree in accounting or business required, as well as, 5+ years of directly relevant experience and experience with QuickBooks and Microsoft Excel. Part-time position paying $25 per hour.

IT Support Technician position at a medical consulting company located in Westbury, NY, with a salary based on experience. Position is responsible for front-line technical support for all users. Travel is required to various offices throughout Nassau and Suffolk Counties. The position is ideal for an entry level applicant.

Billing assistant at system integrator business, specializing in whole house audio / video distribution, located in Westbury, NY. Position is responsible for invoicing customers, issuing credit memos, as well as, other tasks to support Billing Director. Candidates should have a minimum of two years of billing / accounting experience. Salary based on experience.

Staff Accountant position at a dental supply company located in Edgewood, NY, with a salary range of $55 - $62k. Position is responsible for A/P processing, analyzing G/L accounts, posting journal entries, and reconciling bank statements.

The Employment Services Committee updates the database frequently and has the simple goal of connecting potential candidates with companies in search of talented professionals.

For further information on these services, please contact Randy DeYulio at employment@ima-longisland.org.

Institute of Management Accountants, Long Island Chapter proudly presents the prestigious Milton Zipper Financial Executive of the Year Award to:

Jeffrey M. Yonkers, CPA
Chief Financial Officer
Best Market

Join us Tuesday
May 9, 2017
6:00 p.m. - Cocktail Hour
7:00 p.m. - Dinner is Served
Woodbury Country Club
884 Jericho Turnpike, Woodbury, NY
For newsletter submissions contact Joseph Giacinto, VP of Communications at JGiacinto@PBIPayroll.com

For membership contact Vince Palazzolo, VP of Membership at VPalazzolo@CPIAero.com or call 516-524-4839

For sponsorship opportunities contact Carmela Borzelleri, VP of Sponsorship at CBorzelleri@Parkell.com

**NEWSLETTER ADVERTISING RATES**

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www.LongIsland.IMAnet.org
Seriously different.
IMA Long Island Chapter welcomes its new members:

Keith Champagne - Regular Member

A graduate of the City University of New York-Brooklyn College, Marcy Greefield is an audit principal at Berdon LLP, a mid size public accounting firm with offices in Manhattan and Long Island. Marcy has more than 15 years experience in public accounting. She specializes in providing both audit and tax services to real estate clients, as well as clients in the manufacturing and distribution sector.

In addition to her client service obligations, Marcy provides technical training on an array of topics for new staff of her firm and is active in on-campus recruiting for the firm.

She is a former board member of the Long Island Committee for the Association for Corporate Growth. In 2013, Marcy was selected by Long Island Business News as a 40 Under 40 and Ones to Watch honoree. Additionally, in 2016 Marcy received the honor of being named one of the top 50 business woman on Long Island.

When asked what inspires her, March responded, “My goal is to maintain a work-life balance where I am able to service my clients beyond their expectations and also enjoy traveling with my family and friends. I think it is important to find happiness in both your career and family life, and I don’t want to settle for less. “I’m inspired to go for it and have it all.”

Marcy has been a member of the IMA Long Island Chapter since January 2017. We welcome Marcy to the chapter and look forward to her taking on a active role in the future.

Make the most of your IMA membership and save up to 34% in the U.S. and 30% in Canada on UPS® shipping services. Save on a broad portfolio of services, including air, international, ground and freight. Put the power of logistics to work for you. To enroll and start saving today, call 1-800-MEMBERS (1-800-636-2377) M-F 8 a.m. – 6 p.m. EST.
IMA STUDENT ACTIVITIES

JOIN THE IMA AND GET A WORLD CLASS ADVANTAGE

By James L. Smith, CPA - VP Student Activities Committee

Hard to believe but the Universities are almost halfway thru the new semester, as a parent I have mixed emotions. Glad my kids are doing so well and as an accountant wondering what could possibly cost so much per hour!

Today’s students face a host of challenges I could not imagine in my day: student debt, global competition and technology that changes by the day. In this highly competitive world, belonging to an organization like the IMA is not just a resume builder it is a career necessity. The IMA provides students with mentors, tools, experiences and a support team that grows through the years. As a long time IMA member, I have come to appreciate the insight, wisdom and support that I get from the IMA.

In this modern age, the “individual” can no longer be just a technical expert. The need for soft skills and network building is just as important if not more. Being the smartest person in the room is of little value if you cannot get a team or key decision maker to follow your lead. The IMA, as the M in the title may suggest, is a great teacher in the soft skills of management and leadership.

To all of the undecided students on Long Island, take a look. Give us a chance to open up a world of learning, personal and professional growth that is unlike any other in the Professional World. Join us at our next meeting on April 11th, at 6pm at the Woodbury Country Club and get to know us. Once you have you’ll be back.

1st time students, please feel free to reach out to me at jsmith@cusa.canon.com for more information and to register for the April dinner meeting.

ANNUAL CONFERENCE

IMA’s Annual Conference & Expo is coming to Denver this June! This year’s Conference is going to be better than ever with new features and an enhanced program. Here are the top three things you should know about ACE2017:

1. This is the only conference offering 8 new Specialty Tracks designed specifically for management accountants

2. ACE2017 features cutting-edge speakers and more than 65 sessions to choose from to customize your learning experience

3. There are more than 15 networking events to help you connect with your peers and industry experts

Don’t miss IMA’s biggest event of the year! Register today at www.imaconference.org. Don’t delay! Early bird pricing ends of March 31st!
IDUS MARTIAE
March’s meeting came in like a storm. The atmosphere was overwhelmingly calm, as no one showed up. Since we officially canceled the dinner meeting along with all of the associated hoopla, the concepts below represent some semblance of what this humble author would have imagined the dinner to be.
Information Technology Security – what are the biggest threats to your business today?

SPEAKER: Clayton Hart

• Tackle the The Cloud vs. On Premise data security debate.
• Managing IT personnel and securing intellectual property in your business).

Join Clayton Hart, industry leader and expert on business workflow analysis and Information Technology in a discussion to decipher the strategies of protecting proprietary information in your business.

Clay will go in depth on the secrets of the hiring process to protect your businesses intellectual property and build a cult like foundation of personnel within your organization to reduce employee turnover. Master the Top 10 interview questions for hiring on personality not skillset.

Planning for cloud based I.T. initiatives in your organization? Clay will tackle the on premise vs. Cloud security debate and then discuss how to avoid pitfalls and mistakes in qualifying a cloud provider to host business data and applications. This session will present real world case studies of IT planning gone wrong. It will help prepare you to understand cloud security accurately and understand the risks to your organization.

Learning objectives:
Managing People and protecting proprietary information:
• Securing your data and intellectual property from the point of hire.
• The hiring process.
• Top Interview questions to hire on personality, not skill set.
• Does your staff affect the value of your business?

Cloud Provider Assessment:
• How to qualify a cloud provider’s competency to host your information?
• What questions to ask the provider during due diligence?
• How to assess the security risk of cloud hosting and the provider?
• Case Studies on Cloud gone wrong.

Cloud Security:
• Physical security advantages of cloud hosting.
• Logical security advantages of cloud hosting.
• Case studies
• Cloud security revealed - Q&A session

ABOUT CLAY

As CEO and Managing Partner of Diverse Technology Solutions, Clayton Hart keeps his clients at the very pinnacle of the Information Technology age. Founded in 1998, Diverse Technology Solutions Inc. is one of North America’s fastest growing Private Cloud Hosting providers. Clay has been instrumental in accurately forecasting emerging trends in IT and implementing services to provide dramatic return on investment for his clients. Clay and DTS bring a strategic partnership to their client relationships by aligning Information Technology as the epicenter of business profitability.

Clay’s career in IT and expertise in fiscal management spans more than twenty years and has afforded him in-depth knowledge of the highest level IT decision-making processes in thousands of businesses. Clay spent the genesis of his career in network engineering, implementing complex IT projects for prestigious organizations including St John’s University, Sotheby’s, and IBM. His subsequent success in financial management and business workflow expertise has given Clay a unique perspective on how to leverage technology to position a company for financial growth.

A national speaker, Clay has shared the stage with some of the world’s top business leaders, delivering keynote presentations and CPE accredited continuing educational seminars to Fortune 1000 C-level executives. His speaking engagements include topics covering aligning Information Technology with business financial goals, using IT as profit generator, business workflow, IT security and Cloud Computing.

Clayton Hart has lent his business and information technology advice to over a dozen major publications and has been seen in Forbes Magazine, Yahoo finance, marketwatch.com, and various other media outlets. As author of the DTS blog and the book Uncommon with Brian Tracy, Clay strives to bring education, advice, tools and resources to help business owners make more fiscally responsible decisions on the appropriate direction of their Information Technology and business practices.

Clayton Hart, CEO | Diverse Technology Solutions, Inc.
The Long Island Chapter of the Institute of Management of Accountants was charted 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 President’s 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………………..

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

**Quote**

“In the end, it is important to remember that we cannot become what we need to be by remaining what we are.” - Max De Pree