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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 Accounting & Finance Disruption – Use of Artificial Intelligence dinner meeting due to inclement weather. This wonderful program will be presented as part of our program later this year. On April 10, 2018 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 Crisis Management – Protecting Your Assets: Property, Plant and People. I hope to see you there. April is also the time for our annual Long Island Chapter Board elections. Soon you will receive email correspondence with 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 10, 2018. Please contact me if you have any questions regarding this process.

Registration is now open for IMA's Annual Conference and Expo happening June 16 – 20, 2018 in Indianapolis, Indiana. This Conference offers many opportunities to learn, earn CPE credits and network with other attendees from all over the Country. To learn more about the conference and for early bird registration - please visit [www.longisland.IMAnet.org](http://www.longisland.IMAnet.org) for details.

See you soon,

*Carmela*



*Thank You  
To Our  
April Sponsors*



**APRIL 10, 2018 MEETING**

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

*Topic: Crisis Management – Protecting Your Assets:  
Property, Plant & People*

**Speakers:**



**Penny Neferis**  
*Dir. of Business Continuity  
& Emergency Response  
JetBlue Airways*



**Howard B. Price**  
*CBCP / MBCI*



**Gregory R. Tellone**  
*CEO  
Continuity Centers*



**David Garland**  
*Sr. Dir. Business Continuity  
and Disaster Recovery  
CME Group*

**Moderator: Robert Valli, LIU Post**

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



### 2018 Dinner Meeting Schedule

May 8, 2018 Annual Financial Executive of the Year Award Dinner

### Quarterly Breakfast Series

(Breakfast meetings are FREE to Members, \$25 for Non-Members)

April 24, 2018 HR & Employment Law – Current Updates

July 24, 2018 Affordable Care Act & New Tax Law Updates

## 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](mailto:lmazany@signatureny.com) to learn about the significant discounts you are eligible for as an IMA Chapter member.

### 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

### Quote

*“ Only one man in a thousand is a leader of men--the other 999 follow women.”*

*- Groucho Marx*



UPCOMING BOARD OF DIRECTORS ELECTION TO BE HELD ON TUESDAY APRIL 10, 2018

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 10, 2018:

Carmela Borzelleri	President
Renee C. Sumpter	Secretary / VP Admin
Justine Roe	Treasurer
Donna Blanc	VP Education
James Smith	VP Membership
Marcy Greenfield	VP Communications
Marvin Rosen	VP Student Activities
Randy Deyulio	VP Employment
Ayanna Newell	Board Member
Barbara Calissi	Board Member
Cristian Anghel	Board Member
Eren Giray	Board Member
Eric Monroe	Board Member
Ira Kantor	Board Member
Kristina Swindell	Board Member
Marc Despagni	Board Member
Marla Leiman	Board Member
Michael Valveri	Board Member
Rich Richer	Board Member
Rob Valli	Board Member
Rod Ganis	Board Member
Ronald DeVos	Board Member
Steven Kuperschmid	Board Member
Thomas Rosenthal	Board Member
Tom Fazio	Board Member



## APRIL 10, 2018 DINNER MEETING SPEAKER BIOGRAPHIES

### PENNY NEFERIS - *Dir. of Business Continuity & Emergency Response, JetBlue Airways*



Penny Neferis is the Director of Business Continuity & Emergency Response at JetBlue Airways. Penny joined JetBlue in July 1999 and played a key role on the JetBlue startup team. Penny founded the Care and Emergency Response department for the New York-based JetBlue Airways and served as its first Director, developing and implementing the company's emergency response plans, training, procedures, command centers and exercises.

She leads JetBlue's Business Continuity, Disaster Recovery and Emergency Response programs including the development, review, testing, maintenance and auditing of business continuity and disaster recovery plans. She leads a team of professionals to ensure JetBlue is prepared to meet business interruption

events. Most recently, Penny has been asked to lead the System Operations Safety Management System program development, implementation and management.

Penny served as the Chair of the IATA Emergency Response Planners Task Force. She is a member of the Contingency Planning Exchange (CPE), Association of Contingency Planners (ACP), and Northeast Disaster Recovery Information X-change (NEDRIX). She is a certified Associate Business Continuity Planner from the Disaster Recovery International Institute. Penny is also a lecturer for MIT's Crisis Management and Business Continuity course.

A native of New York, Penny holds a Bachelor of Science degree with a dual major in Aeronautics and Management from Dowling College in Oakdale, NY. She lives with her husband, two sons and two dogs in Oyster Bay, NY.

### HOWARD B. PRICE - *CBCP/MBCI*



A business continuity consultant, innovator and thought leader, Howard served as senior manager of business continuity planning for The Walt Disney Company in New York, a position he assumed in October 2016, after two years as director of business continuity planning for the Disney/ABC Television Technology & Operations Group. Price previously served for nearly six years as the director of business continuity and crisis management for ABC News.

A 43-year veteran of radio, television and newspapers, he is a two-time EMMY Award winner, and contributed to ABC News coverage that was recognized with The George Foster Peabody and Edward R. Murrow Awards. He has worked domestically and internationally as a news producer, assignment editor, bureau chief, reporter and anchor, covering some of the biggest stories of our time, including the 9/11 attacks, the 2003 Northeast blackout and Superstorm Sandy.

A certified business continuity professional (CBCP), Howard co-led a team charged with oversight of operational resilience across the Disney enterprise. He holds a

bachelor's degree in journalism from Northwestern University, and an MBA in management and marketing from New York University.

A guest lecturer at the Massachusetts Institute of Technology, he has been a featured speaker at numerous professional conferences and workshops, and a contributor to many trade publications. He is co-founder of the Media Industry Crisis Preparedness Roundtable, and sits on the Risk and Continuity Committee of the North American Broadcasters Association. Howard is a member of the Disaster Recovery Institute International (DRII), the Business Continuity Institute (BCI), the Association of Contingency Planners (ACP), the Contingency Planning Exchange (CPE), the NorthEast Disaster Recovery Information Exchange (NEDRIX), the Society of Professional Journalists (SPJ), the Radio Television Digital News Association (RTDNA) and the National Academy of Television Arts & Sciences (NATAS).

Howard is the founder of the website, [MediaDisasterPrep.com](http://MediaDisasterPrep.com), and writes its companion blog, [MediaDisasterPrep.wordpress.com](http://MediaDisasterPrep.wordpress.com). A married father of two, and a resident of New City, NY, Howard is fond of telling anyone who'll listen that events are disasters only if you haven't planned for them. His e-mail address is [HowardBPrice@gmail.com](mailto:HowardBPrice@gmail.com). Reach him also on Twitter: @HBPrice and @mediadisaster, and on Facebook.

### GREGORY R. TELLONE - *Continuity Centers, CEO*



Gregory is a well-known disaster recovery expert in the New York area, whose illustrious career spans over twenty years in the Business Continuity and Disaster Recovery (BC/DR) field. A self-confessed "recovery geek", Gregory is a thought leader in all things disaster recovery. He has focused his extensive expertise on delivering a consistent approach to recovery for businesses of all sizes, ensuring

business continuity for your employees and your systems. Mr. Tellone has been working in the BC/DR field since 1992, where he started his career at Cheyenne Software, the creators of the ARCserve data backup and recovery software. Years later, he designed and built out worldwide recovery systems and processes for the international consulting firm, McKinsey & Company. As CEO since 1999, he has propelled Continuity Centers forward in their singular mission: rescuing businesses from disasters.

### DAVID GARLAND - *Senior Director, Business Continuity Management*



David Garland serves as Senior Director, Business Continuity and Disaster Recovery at CME Group, owner of the Chicago Mercantile Exchange, New York Mercantile Exchange and the Chicago Board of Trade. He manages the global business continuity, disaster recovery and incident response programs, as well as customer relationships for business continuity.

David also serves as Chairman of the board of directors of NorthEast FIRST and as a member of the board for the Association of Continuity Professionals (ACP) New York City Metro Chapter. He represents CME Group and the derivatives industry on various FS-ISAC, FSSCC and SIFMA committees and working groups.

Previously, David served as Associate Director, Corporate Communications, where he worked on internal and crisis communications and managed the company's employee intranet and newsletter. Before joining CME Group in 2008, David managed Investor Relations and Corporate Communications for the New York Mercantile Exchange.

David's experience in business continuity management began in September 2001, when he was responsible for communicating information about NYMEX's markets and operations to the press, customers and employees following the September 11 attack on the World Trade Center.

He holds a bachelor's degree in journalism and mass communication from University of Wisconsin, Madison.

#### About CME Group

As the world's leading and most diverse derivatives marketplace, CME Group ([www.cmegroup.com](http://www.cmegroup.com)) is where the world comes to manage risk. CME Group exchanges offer the widest range of global benchmark products across all major asset classes, including futures and options based on interest rates, equity indexes, foreign exchange, energy, agricultural commodities, metals, weather and real estate. CME Group brings buyers and sellers together through its CME Globex® electronic trading platform and its trading facilities in New York and Chicago. CME Group also operates CME Clearing, one of the world's leading central counterparty clearing providers, which offers clearing and settlement services across asset classes for exchange-traded contracts and over-the-counter derivatives transactions. These products and services ensure that businesses everywhere can substantially mitigate counterparty credit risk.

David Garland serves as Director, Disaster Recovery and Regulatory Compliance for CME Group, owner of the Chicago Mercantile Exchange, New York Mercantile Exchange and the Chicago Board of Trade. He oversees the global disaster recovery program, business continuity and disaster recovery regulatory compliance, program alignment and customer outreach. Garland also focuses on business resilience and incident response for CME Group's East Coast locations, including its New York Mercantile Exchange (NYMEX) World Headquarters in New York City, Boston and Washington, DC. Garland also represents CME Group on various FS-ISAC, FSSCC and SIFMA committees and working groups. He serves as a member of the board of directors for the Association of Contingency Planners (ACP) New York City Metro Chapter.



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MEMBERSHIP SPOTLIGHT

**Rob Trinchetto, BDO Assurance Partner**



Why I joined the IMA

I have been in the accounting field since 1997, the majority of which has been with public accounting firms. In 2000 I worked in private industry for a short period of time, but then joined BDO USA, LLP in October of 2000, and have been with the firm ever since.

In 2005 / 2006 we were spending a lot of time on a client that was going through the Initial Public Offering process and the Controller asked a few of us to attend an IMA event that she helped organize. As part of her organizational efforts, the CEO of her company was a speaker on the panel at that event. I remember walking into that event at The Milleridge Inn , and I was immediately impressed with the amount of people at the event and the mix of those people. By mix I mean, CFOs, Controllers, public accountants, lawyers and bankers, a perfect networking event.

In becoming a member of the IMA, I have gained valuable relationships with other members, and I hope to contribute to the growth and prosperity of such a quality organization as the IMA by getting involved with the IMA committees.

I would recommend the IMA membership to other professionals for many reasons. The IMA is a great organization that not only educates professionals in the accounting field, it is also a great organization for professionals to network. If you are a partner in a public accounting firm (like I am), the IMA enables you to network with CFOs, other public accountants, bankers and attorneys that can all help you grow your own personal business. If you are a CFO, the IMA gives you opportunities to build relationships with other CFOs, relationships that will allow you to bounce a questions off of somebody that is likely to have experience in whatever issue you might want to bounce off of them. If you are a services provider, the IMA gives you opportunities to network with other service providers, as well as CFOs, Controllers, etc.

MEMBERSHIP BENEFIT

*UPS® Saving Program*

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 GLOBAL NEWS

**A Sandwich Leadership Lesson**

*By Mike Phillips, CMA, CFM*



One inventive professor developed a unique model for effective leadership in any situation.

What does your team say at the water cooler about your organization’s leadership? Before you answer, keep in mind that individuals learn, understand, and remember through different communication styles, mediums, methods, associations, and reinforcements. So you might first ask whether you’ve done your best in demonstrating an understanding of this diversity of perspective by tailoring your communication. Is there anything you could have done differently regarding the leadership, planning, and communication process in various scenarios? What was out of sequence or too little, too late? What messages did you presume to be common knowledge or shared understanding but turned out to be otherwise?

When a leadership initiative, guidance, or communication hasn’t gone as well as I’ve hoped, I think back to a lesson from a favorite college English literature professor. Along with being a respected professor, he was also a minister and had been a race car driver. He was eccentric, but he was also an amazing leader and an expert at inserting practical, interesting meaning into his lessons.

THE SANDWICH LESSON

One memorable day, he challenged us students to teach him how to make a peanut butter and banana sandwich and to help him appreciate what it would taste like. Further, he wanted us to assume he was blind and had never eaten a banana. In other words, the goal was to provide step-by-step instruction using just our words to someone who couldn’t see us and had very little context or relevant experience.

So how do we make this sandwich? We put peanut butter and banana between two pieces of bread and then we’re done. Makes sense, right? Take it a step further. We have an unopened jar of peanut butter, an unpeeled banana, and an unopened bag of bread.

We must also open the jar, peel the banana, open the bread, take two pieces of bread out, and then put the peanut butter on the bread. All good? Not done yet. How do we get the peanut butter out of the jar? A spoon? A knife? What size spoon or



## IMA GLOBAL NEWS ... CONTINUED

knife? Do we use the whole jar of peanut butter? How do we get the banana into pieces to put on the bread? Do we smash it onto the bread, or do we cut it up? Do we make long or round pieces of banana? Do we hold the banana upright? Do we even have any peanut butter and bananas, or do we have to go shopping first? And on and on.

What the sandwich scenario teaches us is this: Perhaps to those who've been making sandwiches for years, all this is obvious. But if someone has never done this before, they have no frame of reference.

Once we've explained how to eat it, we still need to explain what the sandwich is going to taste like. We might say it's going to be a cold sandwich, that it's a little chewy and soft, and that it will be sweet. But are we saying it's cold like ice or just room temperature? But wait, is it sweet like ice cream? Or is it sweet like chocolate? Remember, the recipient has never tasted a banana, so he has no frame of reference. How would we communicate the flavor to him?

### TEACHING OTHERS

Transfer this creative project to the day-to-day business world, and it becomes clear that strong leaders need to consider their audience and deliver messages thoughtfully within full context: sharing how the decision was reached, steps taken to analyze the situation or options, where the plan was headed, or how it impacts both the team and clients. This is a necessity each time we lead our teams, define a process, and communicate.

Within our accounting and finance lives, we frequently have these types of opportunities to improve how we lead our teams. For instance, when we alter a long-accepted routine process, we have to adjust fee schedules knowing that the increase will be a challenge for some of them. Or if we change the cost of employee benefits, it could result in a reduction in employee take-home pay. These are common scenarios. If we involve our teams in the background, reasoning, and planning discussions for process changes, the thoroughness of the implementation and level of acceptance will be more successful, and we may even learn of ways to make the process better than we originally had hoped.

For example, by helping our team members understand why we're changing our fee schedule and how the changes will be implemented, tested, and rolled out, and realistically planning for client concerns, we can go far to decrease the difficulty while reducing our team's stress level. And, of course, with any scenario that involves employee benefits and payroll, we must acknowledge that the viewpoint, level of understanding, and focus of importance could be drastically different for each employee. Any misstep in our plan and communication efforts could amplify and spread quickly. I'm confident that within each of these scenarios we can recall similar situations during our careers as either a deliverer of the message or the recipient and think of ways the situation could have been handled differently. Our challenge is to learn from those lessons and remember them as new opportunities arise.

### MANAGE AUDIENCES

The need to consider all the details and the best way to communicate them for accuracy is inherent to the challenges of leadership, process design, implementation, and communication. Every day we have to manage multiple audiences who have various frames of reference and who use multiple delivery channels. We should always be conscious of keeping our leadership guidance messages simple yet complete, targeted by audience, sequenced appropriately, comprehensive yet not overwhelming, and guided by an awareness that recipients learn and absorb knowledge differently. Our teams want and need leadership and guidance so they can understand, buy in, support, and continue to grow stronger. Our role as leaders is to provide this to them. Our challenge every day is to teach others how to make the sandwich.

### IMA LEADERSHIP ACADEMY

The IMA® Leadership Academy provides leadership opportunities for all members. From leadership assessment to leadership courses offered in person as well as through WebEx to participation opportunities in mentoring, be it reverse or traditional, the IMA Leadership Academy can help you meet your leadership goals and improve your leadership skills. For more information, please visit the Leadership Academy website at [www.imanet.org/career-resources/leadership-academy](http://www.imanet.org/career-resources/leadership-academy).



## IMA STUDENT ACTIVITIES

### Adelphi Campus Visit

*By Marvin Rosen - VP of Student Activities*

February 7,  
I had the pleasure of presenting at the Adelphi University Accounting Society meeting, our host was Jennifer Blandeburgo President of the Accounting Society.

Adelphi has a very active accounting society, they have approximately 100 members, we had about 20 members present at the meeting, and several of their members had attended our fall student workshop.

The Adelphi students saw the Value of joining the IMA and opening the door to a lifetime of networking, mentoring, career opportunities and advancement for its students. I explained to the group that having an IMA partnership with Adelphi can help Students to develop vision, set goals, and grow their leadership skills. And help student members to better understand how diverse their opportunities are and how to focus in on what career path is best for them individually.

I invited them to attend at our monthly meeting which helps students improve their soft skills by giving them a

safe and professional environment to interact with business professionals in a real world setting. This ultimately helps them develop and improve their communication skills and boost their confidence for upcoming interviews.

The feedback we get from our student members is that most of the larger accounting firms recruit on campus but representation by regional firms and private companies is sometimes lacking. Through the IMA these students have been exposed to accounting firms of all sizes as well as CFO's from many local companies. This has given them a broader perspective of all the job opportunities that are available to them, as well as help in seeing how their individual skill sets fit best in the many different careers that are available.

Although this was our first meeting with the accounting society, we had visited the campus in the fall for the accounting society's career night

We look forward to seeing many of the students at our monthly meeting in the near future, and hope to increase the IMA campus presence at Adelphi.





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 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.....

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

Quote

*"It is not the strongest of the species that survive, nor the most intelligent, but the one most responsive to change."*

*- Charles Darwin*