



The Association of  
Accountants and  
Financial Professionals  
in Business

**2017 – 2018**

# **Annual Program Booklet**

**WinnebagoLand Chapter**

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## About IMA

**Mission:** “To provide a forum for research, practice development, education, knowledge sharing, and the advocacy of the highest ethical and best business practices in management accounting and finance.”

**Done By:**

- Offering a rigorous, highly respected credential—the CMA—that recognizes and rewards expertise
- Building a peer network of professional relationships to share industry experience, access career opportunities, and make business contacts to last a lifetime
- Providing extensive education programs to advance professional knowledge, increase leadership potential, and satisfy CPE requirements
- Giving a voice to the profession with insightful and timely journals and newsletters
- Promoting leading-edge research and industry best practices
- Advocating for the profession in a challenging regulatory environment

IMA currently represents more than 85,000+ accountants and financial professionals in business. The participation of each of our members makes the success of our mission possible.

## Attend a Meeting

To register for a meeting, click on the registration link for the meeting from within this program booklet and/or a monthly newsletter.

## Join the IMA

To become a member of the IMA, go to [www.imanet.org/membership](http://www.imanet.org/membership)

*Winnebagoland Chapter Number is 0389.*

Any questions, please email our Meeting Director – Martha [mlpaalman@bemis.com](mailto:mlpaalman@bemis.com).

# DREAMS + WORK SUCCESS

Beyond the balance sheets and income statements are dreams; for yourself, your customers, your company and your communities. When your work with the numbers makes a difference, dreams and work add up to success.



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### Mid-America Council



<http://www.midamerica.imanet.org/>

Did you know that the Winnebagoland Chapter is part of a regional council, the Mid-America Council, made up of 11 chapters? The geographical coverage for the MAC is Wisconsin, Illinois, and parts of Iowa and Indiana. Each chapter operates independently with the council overseeing their activities and providing support and guidance as needed. World-wide there are 24 councils with almost 150 active local IMA chapters!

You can be a part of the regional council activities by being a chapter delegate. Every chapter in the council is allowed up to three delegate votes at each quarterly council meeting (held in July, October, January, and April.) It's a great opportunity to share ideas, strategies, and learn about the work going on at the global level.

The council also sponsors an annual educational conference and training session, providing council members, guests, and students with a great source of CPE and an opportunity to network with other IMA members.

### SAVE THE DATE!

Annual Spring Educational Conference (SEC) and Leadership Training Session (LTS):

Thursday, April 26th and Friday, April 27th, 2018

NIU, Rockford, IL

The Winnebagoland Chapter currently has a number of members on the council board:

**Rick Bellmore** – Council President

**Martha Paalman** – Council Secretary

**Bill Ramsay** – Council Newsletter Director and Past President

**John Wieland** – Council Regional Director and Past President

If you are interested in attending a council meeting, becoming a council delegate, or learning more about the regional or global IMA organization, please contact one of the council members listed above (contact info on page 27)!

# Ethics Review

IMA's revised Statement of Ethical Professional Practice (SEPP) went into effect July 1. Learn more about the revision and talk about ethics issues in management accounting and participate in case study discussions while earning the 2 hours of CPEs for ethics for 2017!



Date: Tuesday, September 19<sup>th</sup>, 2017

Time: 5:00-5:30 Networking/Cocktails  
5:30-6:00 Dinner  
6:00-8:00 Speaker/Round Table

Location: Liberty Hall (800 Eisenhower Drive, Kimberly, WI 54136)

Speakers: Mary Diederich & Jill Halverson – University of Wisconsin

Register: <https://www.eventbrite.com/e/september-2017-winnebagoland-ima-meeting-tickets-35415617064>



# Mary Diederich, CPA, CIA, CMA, MBA

**Senior Lecturer/Adjunct Professor**

**Owner, Mary K Diederich LLC**

Mary has more than 30 years of diverse experience in public accounting, private industry and teaching various accounting courses at UW-Fox Valley, UW-Oshkosh and Lakeland University, plus maintains her own independent accounting practice.

Besides teaching, Mary specializes in working with small businesses, non-profit organizations and tax clients. She also serves as a SCORE mentor.

## **Expertise:**

- Accounting and Financial Reporting and Analysis
- Controller-for-Hire Services
- Individual Taxation
- Internal Audit
- Business Planning
- Internal Controls

## **Education:**

- University of Wisconsin – Oshkosh; Bachelor of Business Administration – Accounting
- Lakeland University – Masters of Business Administration







# Jill Halverson, CMA, MBA

Assistant Professor

University of Wisconsin Colleges

With more than 20 years of industry experience in non-profit, financial services, and manufacturing in marketing, marketing research, and management accounting roles, Jill has made academia her second career, teaching primarily at the University of Wisconsin Fox Valley. She also teaches online for UW Colleges and has done development and assessment work for UW Extension's new flexible business degree, the Bachelor of Science in Business Administration. She is also an active volunteer for Junior Achievement and a Trustee for the Menasha Public Library.

## Courses Taught:

- Introduction to Business
- Career & Life Planning
- Introduction to Financial Accounting
- Managerial Accounting
- Intermediate Accounting
- Sustainability in Business
- Business Communication

## Education:

- University of Wisconsin – Oshkosh; Master of Business Administration
- Concordia University – Graduate Certificate in Corporate Communication



# Bonus Event!

## Lion's Tail Brewing Company Tour

Come enjoy a pint of beer while touring one of Downtown Neenah's newest businesses – Lion's Tail Brewing Company!

Opening in November 2015, Lion's Tail took over an old bank building for a truly unique brewery feel. Serving 10 beers brewed right in their taproom, while also serving local 'guest beers', Lion's Tail is a great place to catch up with old friends and try a few new brews!

Take a tour of their facility, and hear directly from Alex Wenzel, Owner of the Brewery, about his journey starting his own brewery.

Spouses and guests are welcome to this event!



Date: Thursday, October 5<sup>th</sup>, 2017

Time: 5:00-6:00 Tour  
6:00-7:30 Happy Hour (cash bar)

Location: Lion's Tail Brewing Company (116 S Commercial St, Neenah, WI 54956)

Register: <https://www.eventbrite.com/e/tour-lions-tail-brewery-tickets-35442550623>



# Accounting Fair & Finance Jeopardy

One of the best things about the accounting profession is the wide array of topics, career paths, personalities, and experiences that can be found within it. Join us for an engaging and interactive evening of networking, collaboration, and education as we explore the world of Accounting and the IMA.

Our Accounting Fair will provide an opportunity to discover some of the great perks of our local chapter and the Global IMA organization, along with a wide range of useful and relevant topics and activities related to the Accounting profession as a whole. Dinner will be followed by a chance to flex your Accounting and Finance brains in a battle for the grand prize in Finance Jeopardy!

Plenty of networking opportunities will be present throughout the evening. Bring your curiosity, your competitive streak, and your quick-thinking reflexes!



Date: Tuesday, October 24<sup>th</sup>, 2017

Time: 5:00-6:00 Accounting Fair  
6:10-6:40 Dinner  
6:45-7:45 Game show  
7:45-8:00 CMA Presentation and Raffles

Location: UW Oshkosh Alumni Center (625 Pearl Avenue, Oshkosh, WI)

Register: <https://www.eventbrite.com/e/winnebagoland-ima-student-night-tickets-35442954832>

# Pierce Manufacturing: Tour and Cost Management

Ever wonder what happens behind the scenes of the making of a fire truck? There's more than bells, whistles, and fire horns happening at Pierce Manufacturing, a subsidiary of Oshkosh Corporation.

From Pierce/Oshkosh's Quality and Continuous Improvement (Q&CI) team, Matt Barnes joins IMA-Winnebagoland. One of Matt's specialties is lean business practices to eliminate process waste and he will share about the organizations' accomplishments.

Join us for a tour, also, of one of Pierce's ISO-9001 certified, state-of-the-art, manufacturing facilities in Appleton. Seeing is believing of the thousands of customizations engineered for departments across the world. Matt and colleague Pete Evans will give attendees an up close view!

With all of that customization occurring, consider the impact on finance and accounting. How do those cost accountants do it? How does one deploy quality control standards, lean concepts, and continuous improvement in finance and accounting? Come learn from Matt!

At Pierce Manufacturing and Oshkosh Corporation, "Quality is the ultimate team sport." Linked closely with its OOS (Oshkosh Operating System), the Oshkosh Quality Policy and Enterprise Quality Management System (QMS) ensure that quality is a way of life. Quality is everyone's job – from those who work in manufacturing to finance to aftermarket support to purchasing. Improving quality can start with the simplest process change!



Date: Wednesday, November 15<sup>th</sup>, 2017

Time: 5:00-6:00 Tour  
6:30-7:00 Dinner  
7:00-8:00 Speaker

Location: Tour: Pierce Manufacturing (2600 American Drive, Appleton, WI)  
Dinner: Machine Shed (220 N Fox River Drive, Appleton, WI)

Speaker: Matthew Barnes and Pete Evans (Pierce Manufacturing)

Register: <https://www.eventbrite.com/e/november-2017-winnebagoland-ima-meeting-tickets-35440461374>



# Matthew Barnes

## Director of Finance – Pierce Manufacturing

Matthew Barnes is the Director of Finance for Pierce Manufacturing, a position he has held since February 2016. His responsibilities include cost accounting, ENG and NPD support, and tactical and strategic pricing. He leads the Pierce operations finance team and partners with manufacturing, engineering, and sales leaders to drive financial performance improvements. Matt has had a two year emersion in lean principles and deployed the Oshkosh Operating System (OOS) for global finance. Throughout his career, he has had a business partnership focus, assisting decision makers by transforming data into useful information.

Prior to his current role, Matt held positions in Oshkosh Corporation as Director of Finance and Project Director. In addition to the OOS deployment, his Oshkosh Corp. projects included: Facilitated activities of the OOS Application team to spread the use of lean tools & methods. Created and implemented 11 standard Key Performance Indicators (KPIs) across 26 manufacturing facilities around the world and achieved 92% adoption in less than one year. Launched the Enterprise Warranty system within the Defense segment with limited business interruption. Deployed foundational enterprise technologies including data integration services, secure external user access, and a quality assurance management application.

In both public and private companies, Matt has 15 years' experience in Finance & Accounting. Prior to Pierce Manufacturing and Oshkosh Corporation, Matt held positions at McNeilus Truck and Manufacturing, Inc. as Controller, Manager of Financial Planning & Analysis, and Senior Financial Analyst. At Schreiber Foods he was an Analyst for both Pricing and Cost. Matt earned his bachelor of business administration at St. Norbert College and recently completed a master of business administration at University of Wisconsin-Oshkosh.





# Pete Evans

## Director, Business Development

### Pierce Manufacturing/Oshkosh Corporation Fire and Emergency Segment

Pete Evans is the Director of Business Development for Oshkosh Corporation's Fire and Emergency Segment and Pierce Manufacturing, a position he has held since 2009. His responsibilities include managing the overall strategic planning process for the segment along with the strategy deployment process which links the overall 5 year plan to actionable activities to drive the desired outcomes. He also has lead key strategic projects for the segment notably the New Global Striker and Global Pumper new product development projects and Project Dragon, a partnership to supply fire apparatus bodies to a Chinese auto company to build fire apparatus in China. Prior to his current role, Pete has held various positions in executive management finance and sales including General Manager of Medtec Ambulance and leading the transition of ownership of a key fire apparatus dealership.

Prior to Pierce Manufacturing and Oshkosh Corporation, Pete held positions in finance, new product development and engineering for CNH Corporation, AlliedSignal Corporation (now part of Honeywell) and EDS (part of General Motors at the time).

#### Expertise:

- Strategic planning and execution
- Executive management
- New product development
- Project management
- Financial modelling and complex project justification
- Capital spending management



#### Education:

- Carnegie Mellon University, Masters of Science in Business Administration with emphasis in strategy, finance and marketing
- Milwaukee School of Engineering, Bachelors of Science in Industrial Engineering, minor in business management

# Planning for the Best Years of Your Life

When you dream about retirement, what does it look like? Will you be ready? We'll show you some simple steps you can take to move toward your dreams and get ready for retirement.

## Highlights:

- Understanding how spending usually changes
- What will Social Security provide?
- Preparing for inflation and longer life expectancies
- Should you sell your house and rent?

In 50 fast moving minutes, Alan Prah! will offer some practical advice and insights. Alan is the Education Manager for the Financial Information & Service Center or FISC.



\*December is guest night and awards night. Bring a spouse or a friend, try your luck at our holiday raffles, and bring non-perishable food items to be donated to a local food pantry!

Date: Tuesday, December 12<sup>th</sup>, 2017

Time: 5:00-5:30 Networking/Cocktails  
5:30-6:00 Dinner  
6:00-7:00 Speaker  
7:00-8:00 Awards/Raffles

Location: Stone Toad (1109 Oneida St, Menasha, WI 54952)

Speaker: Alan Prah! (Financial Information & Service Center, Inc.)

Register: <https://www.eventbrite.com/e/december-2017-winnebagoland-ima-meeting-tickets-35441539599>





# Alan Prahl

## **Education & Marketing Leader Financial Information & Service Center, Inc. (FISC)**

Alan is the Education and Marketing leader of FISC. His work includes planning and teaching financial programs on a wide variety of personal financial topics. Previous work experiences include managing a nationwide tax association and serving as a retirement plans consultant for two national pension consulting firms. Alan has an undergraduate degree from the University of Wisconsin in Madison and a law degree from Hamline University.





# Annual Tax Update:

## Business & Individual

After another year of tax reform do you understand the tax law changes made and how these changes will affect you?

Join us to discuss the latest tax reform for 2017 and how these Federal and State changes will affect your business and personal income taxes.



Date: Tuesday, January 16<sup>th</sup>, 2018

Time: 5:00-5:30 Networking/Cocktails  
5:30-6:00 Dinner  
6:00-7:30 Speaker

Location: West Wis Diner ( 3011 W Wisconsin Ave, Appleton, WI 54914)

Speaker: Andrew Mathes & Michael Matuszak (KerberRose CPA's)

Register: <https://www.eventbrite.com/e/january-2018-winnebagoland-ima-meeting-tickets-35441911712>



## **Michael Matuszak, CPA**

### **Tax Manager**

Michael Matuszak is a tax manager at KerberRose CPA's and oversees their Wausau office. Michael has been with KerberRose CPA's for two years and worked previously for a local CPA firm in the Central Wisconsin area.

Michael specializes in working with closely held businesses and is able to provide a wide array of services assuring his clients are well taken care of. Michael understands the importance of staying current with the latest business and individual tax law changes allowing him to maximize clients' tax results and minimize audit risk.

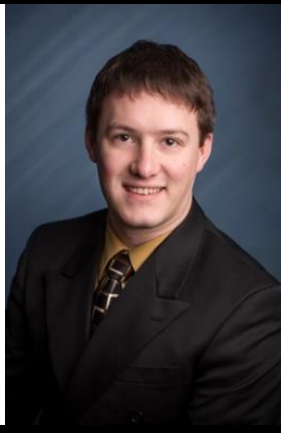
#### **Expertise:**

- Corporate, Partnership, and Individual Taxation
- Entity selection for new and existing businesses
- Financial Reporting
- Business Forecasting
- Write-up and Payroll Services

#### **Education:**

- University of Wisconsin – Stevens Point; Bachelor's degrees in Accounting and Business Administration





## **Andy Mathes, CPA**

### **Tax Manager**

Andrew Mathes is a tax manager with KerberRose CPA's and oversees their Oshkosh office. Andrew has been with KerberRose for three years and worked previously for a large CPA firm in Madison, WI.

Andrew specializes in providing accounting, tax, and consulting services to closely-held small and medium sized businesses. Andrew also provides tax planning and compliance services for individuals.

Andrew is an active member of the WICPA taxation committee, participates in multiple State and Local Tax (SALT) accounting organizations, and serves on the finance board for the Evergreen Community in Oshkosh.

#### **Expertise:**

- Corporate, Partnership, and Individual Taxation
- Entity selection for new and existing businesses
- Financial Reporting
- State and Local Tax Compliance and Planning

#### **Education:**

- University of Wisconsin – Madison; Bachelor's degree in Accounting and Master of Accountancy in Taxation



# Bonus Event!

## “The Accountant” – Movie and Discussion

Some cook the books while others uncook the books. Join us to watch the movie, "The Accountant," then follow up with discussion. Take a break to put some fun into the topic of business ethics and fraud with this drama, action, and crime thriller starring the high-functioning autistic character, Chris Wolff, played by Ben Affleck.

The storyline follows a small-town Illinois forensic accountant who actually makes his living unmasking insider financial deceptions and internal embezzlement of dangerous criminal organizations around the world.

We'll discuss the movie following the viewing – share take-always. With the variety of backgrounds and experiences of IMA members and students, there's sure to be a wide-variety of discussion! Bring along your non-accountant, adult guest to add another perspective to the conversation.

Note: The movie's Motion Picture Rating (MPAA) is Rated R for strong violence and language throughout.



Date: Saturday, February 10<sup>th</sup>, 2018

Time: 1:00-3:30 Movie  
3:30-4:30 Discussion

Location: TBD

Register: <https://www.eventbrite.com/e/the-accountant-movie-and-discussion-tickets-35442735175>

# Parliamentary Procedure & How to Run a Meeting

Do you sit in a lot of meetings? Do many meetings go in tangents? Do meetings last longer than necessary? Most meetings follow Robert's Rules. Do you know what that means? Has someone asked for a point of order? This month's speaker will address meeting procedure etiquette and Robert's Rules. Knowing certain tips will help you to get a meeting back on track, help you to make meetings more productive and beneficial.



Date: Wednesday, February 21<sup>st</sup>, 2018

Time: 5:00-5:30 Networking/Cocktails  
5:30-6:00 Dinner  
6:00-7:00 Speaker

Location: Darboy Club (N9695 County Rd N, Appleton, WI)

Speaker: Dave Anderson (Assistant Deputy Secretary, DWD)

Register: <https://www.eventbrite.com/e/february-2018-winnebago-land-ima-meeting-tickets-35442129363>



## David Anderson

Dave Anderson was appointed Assistant Deputy Secretary of the Department of Workforce Development in December 2013. Assistant Deputy Secretary Anderson brings extensive experience in senior policy, management and constituent relations to his role.

A native of Hazelhurst, Assistant Deputy Secretary Anderson is a 1978 graduate of the University of Wisconsin-Superior with a Bachelor of Arts degree in Social Studies and German. He started his professional career as a High School German Teacher in Minocqua. While teaching, he was elected to the Oneida County Board of Supervisors and was a Supervisor, and later Chairman, for the Town of Hazelhurst.

Assistant Deputy Secretary Anderson's state government experience includes roles as Director of Appointments for former Governor Tommy G. Thompson and, later, the Director of the Governor's Northern Office in Hayward. He also served as a Policy Advisor and was the Executive Assistant to the Secretary of the Wisconsin Department of Financial Institutions. He was Policy Director for Governor Scott McCallum in 2002 before moving to the private sector as Government Relations Director for the Ruder Ware Law Firm in Wausau.

During his career, Assistant Deputy Secretary Anderson served as a top adviser to former U.S. Senator Robert W. Kasten, Jr., former Congressman Tom Petri of Fond du Lac and, most recently, current Congressman Sean Duffy of Wausau.

Assistant Deputy Secretary Anderson has extensive background in parliamentary procedure through his longtime involvement in a variety of community and political organizations, most notably serving over ten years as the Chair of the Constitution Committee and the Rules Committee for the Republican Party of Wisconsin.

Assistant Deputy Secretary Anderson is currently a member of the Board of Curators of the Wisconsin Historical Society, the Circus World Museum Foundation, and the Board of Advisors of the Wisconsin Institute of Public Policy and Service. He is a former chairman of the Board of Directors for UW-Superior Alumni Association and also serves as President of the UW-Superior Foundation Board of Directors.





# IT Tips for Accountants

## IT Security, Cyber Security, Information Security...

### Whoa, what does it all mean?

We're constantly hearing in the news talk about threats from hackers of all levels. In the last year the world has experienced Crypto Worms (WannaCry, Petya, etc), Russian hacking of critical infrastructure and voting systems, and continued information breaches at companies both large and small.

### What can we do to protect ourselves and our companies from all of these threats?

Matthew will cover the topics below so you can leave feeling more informed about security for yourself and your company:

- Business Email Compromise
- Security audit frameworks (specifically AICPA SOC 2)
- Hacks of the SWIFT banking system
- Current Security issues in the news
- Q&A for any cyber security related questions you have



Date: Tuesday, March 20<sup>th</sup>, 2018

Time: 5:00-5:30 Networking  
5:30-6:00 Dinner  
6:00-7:30 Speaker

Location: TBD

Speaker: Matthew Thomson (Vice President IT Security, Community First Credit Union)

Register: <https://www.eventbrite.com/e/march-2018-winnebagoland-ima-meeting-tickets-35442255741>



## **Matthew Thomson,** **CISSP, GSEC, GCIH, GPEN, GXPN, ITILv3** **Vice President IT Security**

Matthew has over 10 years of Information Technology and Information Security experience in both the U.S. government and private industry. He is an expert in operating, maintaining, defending, and securing both large and small enterprise networks and information. Matthew has experience with multiple security audit frameworks including the AICPA's SOC 2 Type 2 audit. Matthew's forte is understanding many different hacker methodologies and applying that knowledge to developing a risk based approach to securing an organization's network and information.

### **Education:**

- Marquette University, BS, Computer Science
- University of Maryland University College, MS, Information Assurance

### **Key Accomplishments:**

- Reduced known vulnerabilities by 70% across the U.S. Air Force's European network which resulted in the unit's first "Excellent" rating for a cyber-readiness audit
- Led multiple small teams of information security professionals conducting incident response actions in critical U.S. Government networks, eliminating the presence of known nation-state hackers.
- Coordinated with an independent third-party organization to prepare Breakthrough® Fuel for their first ever AICPA SOC 2 Type 2 audit.



# Excel Tips and Tricks

As financial professionals, educators, or students, we all spend a good portion of our day on the computer. There's a decent chance that a large chunk of that screen time involves Excel or another spreadsheet software program. Accountants love numbers, and we love them organized in rows and columns! We all possess varying levels of expertise and have learned to do some extraordinary things within the program. Join us for a session where you'll learn that as much as you think you know about Excel, someone always has something new to teach you! Be it lookups, nested formulas, or crazy macros, the prospects to automate and save time are enormous.

\*If there are certain topics of personal interest to you, there will be multiple opportunities to request their inclusion in this program, so keep an eye out for that communication starting in September.



Date: Wednesday, April 18<sup>th</sup>, 2018

Time: 5:00-5:30 Networking/Cocktails  
5:30-6:00 Dinner  
6:00-8:00 Speaker

Location: Liberty Hall (800 Eisenhower Drive, Kimberly, WI)

Speaker: Harlan J. Fuller (Assistant Professor, Illinois State University)

Register: <https://www.eventbrite.com/e/april-2018-winnebagoland-ima-meeting-tickets-35442327957>



# Harlan J. Fuller

## Instructional Assistant Professor of Accounting, Emeritus, Illinois State University

Harlan Fuller recently finished a 35-year career at Illinois State University as an Accounting Educator. At the 2003 IMA Annual Conference in Nashville, Tennessee, his interest in Excel was spiked by one of the breakout sessions. Since then, Harlan has spent considerable efforts finding real business problems that can be solved easily and efficiently using excel. For the last five years, he has taught an information systems class that spends ten weeks on advance excel topics. The feedback from this class from the students has been it is the most valuable class they took while in college, allowing them to hit the ground running at their new employers. The focus of the class was not to learn how to do what their new employers were doing, but finding new, more efficient solutions to the tasks.

### Expertise:

- Certified Public Accountant
- Certified Management Accountant
- Certified in Financial Management

### Education:

- Illinois State University, Masters of Science in Accounting, Bachelors of Science in Accounting



# ILLINOIS STATE UNIVERSITY

# Mental Models & Personal Paradigms: The Stories We Tell Ourselves

How many decisions do you make each day? As a leader, our decisions have long-lasting and significant impacts on our organizations and our people. One way to improve decision-making is to understand how our mental models play a role without us even knowing it.

Mental Models are valuable generalizations that help us all make meaning of situations. However, most of us don't realize how deeply rooted these are and how they impact our understanding and decision making. Many times, our mental models prevent us from thinking creatively and serve as a barrier to change. Strengthen your leadership effectiveness by challenging your own mental models and personal paradigms.



Date: Tuesday, May 15<sup>th</sup>, 2018

Time: 5:00-5:30 Networking/Cocktails  
5:30-6:00 Dinner  
6:00-7:00 Speaker

Location: La Sure's (3125 S Washburn St, Oshkosh, WI)

Speaker: Angela Marshalek (Director of Services for the Center for Exceptional Leadership)

Register: <https://www.eventbrite.com/e/may-2018-winnebagoland-ima-meeting-tickets-35442387134>



# Angela Marshalek

## Director of Services

Angela Marshalek has a long history of developing others from her most recent position, Manager of Organizational and Staff Development at Fox Valley Technical College, her work designing and facilitating adult learning and providing leadership coaching at Gehl Company, Humana all the way back to her start as an English teacher.

Angela is currently enrolled as a doctoral student in the area of Leadership Studies at Marian University. Her current and previous experiences, as well as her visible passion for developing exceptional leaders, allow the Center for Exceptional Leadership, and therefore community organizations and leaders, to greatly benefit having Angela as the Director of Services.



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LEADERSHIP**

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at St. Norbert College



### Officers & Directors

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Member	Emily Rasmussen	emily.rasmussen@bakertilly.com
Member	Colleen Srnka	colleensrnka@gmail.com
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Member - Website	Martha Paalman	
Member - Community Svc	Open	
Member - Booklet	Open	
Member - Public Relations	Gary Streich	
Member - Employment	Gayle Brown	winn.ima.empl.dir@gmail.com
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Secretary	Kyle Thibodeau	thibok70@uwosh.edu
President (Spring Semester)	Ryan Mudge	mudger25@uwosh.edu

### Websites

Chapter	<a href="http://www.winnebagolandima.com">www.winnebagolandima.com</a>
LinkedIn	<a href="http://www.linkedin.com/groups?gid=3197794&amp;trk=myg_ugrp_ovr">http://www.linkedin.com/groups?gid=3197794&amp;trk=myg_ugrp_ovr</a>
Facebook	<a href="https://www.facebook.com/pages/Institute-of-Management-Accountants-IMA-Winnebagoland-Chapter/134944876526330">https://www.facebook.com/pages/Institute-of-Management-Accountants-IMA-Winnebagoland-Chapter/134944876526330</a>
Employment	<a href="mailto:winn.ima.empl.dir@gmail.com">winn.ima.empl.dir@gmail.com</a>
Regional	<a href="http://www.midamerica.imanet.org">www.midamerica.imanet.org</a>
Global	<a href="http://www.imanet.org">www.imanet.org</a>

### Officers & Directors (cont'd)

Put a Face to the Name – Meet this program year's board of directors!



**Craig Gloudemans**



**Patti Denton**



**Linda Geiger**



**Gayle Brown**



**Martha Paalman**



**Curt Esser**



**Emily Rasmussen**



**Colleen Srnka**



**Gary Streich**



**Rick Bellmore**



**Bill Ramsay**



**John Wieland**



**Amber Beistle**



**Kyle Thibodeau**



**Ryan Mudge**

### President's Message

This year has been a year of slight change and more direct focus from a board perspective setting us up for future chapter success. As I reflect back at what our chapter accomplished last year you should be proud. With your help, participation, and direction by the Winnebagoland board your chapter is again an award winning chapter. We were awarded 1st place overall in our division which has 75 other international chapters similar in size to our chapter. We also won 2nd and 3rd places for our website and newsletter respectfully. I want to take a moment to thank the board members and all those that had a part in planning and executing our award winning year. I had the opportunity to accept the award on June 20th at the annual IMA conference in Denver, which again this year had an all-star lineup of speakers and presentations to help those in attendance grow in their knowledge of our industry, network with those in attendance, and most importantly have fun and share a few laughs with other members.

Our global IMA has continued to add value to our membership with the CareerDriver and mentorship programs and we as a local chapter keep striving to add value to your membership at our level by bringing you very affordable monthly CPE along with networking opportunities to make new connections and continue old connections. We also want you to know that we give leadership opportunities also on your local chapter board. I know I have personally grown in my leadership abilities, confidence in myself, and thinking strategically by being on the Winnebagoland board.

This year at our annual Winnebagoland chapter planning meetings in May and June we performed another planning session of start, stop, continue. These planning sessions help guide the board specifically for this next year and into the years to come. We would love to have you join in on our monthly board meetings, September - May, to add a new perspective and ideas to make sure we stay relevant and continue to add value which compliments your career. We have many different board commitment levels which help support your chapter. Our strategic focus this year will be to continue to diversify the board and succession planning to bring in new members that the current board can mentor, another area of focus is to implement a new member orientation, and the last area is to continue to deepen the relationships with the local colleges, not only UW-Oshkosh, for we are fortunate to have other colleges in our region as well.

Remember you are our chapter's biggest asset and promoter. We have so many great members that have ideas to make our chapter even better and connections of others that you know that would benefit from what we do as finance professionals in our chapter. Please take this as an invite for you to think of a coworker or friend that might want to join you at one of our monthly meetings so they can see first-hand why we are one of the best IMA chapters! Please let me know if you have any questions or comments on the chapter or the coming year. I would love to connect with you. My email is gloudemc@yahoo.com.

Sincerely your chapter president,

*Craig Gloudemans*



Craig Gloudemans – Winnebagoland chapter President, and Marc Palker – IMA Board Chair



Deb Hansen (Winnebagoland member) and Craig Gloudemans at the award luncheon in Denver

### Past Presidents

(10 most recent)

2016 – 2017	Craig Gloudemans	1 <sup>st</sup> Place, Newsletter (3 <sup>rd</sup> ), Website (2 <sup>nd</sup> )
2015 – 2016	Mayur (Mo) Ranpara	15 <sup>th</sup> Place, Banner
2014 – 2015	Craig Gloudemans	
2013 – 2014	Tina Krueger	
2012 – 2013	Cynthia Kopesky	
2011 – 2012	Rick Bellmore	
2010 – 2011	Tina Krueger	
2009 – 2010	Gary Streich	14 <sup>th</sup> Place, Banner
2008 – 2009	Rick Bellmore	
2007 – 2008	Christine Wilfer	8 <sup>th</sup> Place, Banner

Just because you work with numbers,  
doesn't mean you have to be one.

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### Outstanding Members

(10 most recent)

2016 – 2017	Emily Rasmussen
2015 – 2016	Martha Paalman
2014 – 2015	Gayle Brown
2013 – 2014	Curt Esser
2012 – 2013	Martha Paalman
2011 – 2012	Deb Hansen
2010 – 2011	Martha Paalman
2009 – 2010	Linda Geiger, Ann Keller
2008 – 2009	Martha Paalman
2007 – 2008	Curt Esser, John Wieland

### Perfect Attendance

Rick Bellmore	23 years	Linda Geiger	4 years	Diana Enciso	1 year
Curt Esser	16 years	Amanda Bartel	1 year	Emily Rasmussen	1 year
Gary Streich	12 years	Amber Beistle	1 year	Colleen Srnka	1 year
Martha Paalman	11 years	Gayle Brown	1 year		
Ann Keller	9 years	Patti Denton	1 year		

### 1000 Point Club

10 years perfect attendance – not necessarily consecutive.

William Zorr	26 years	Raymond Rewalt	15 years	Donald Peotter	12 years
Larry Koeppen	25 years	James Wacker	15 years	William Ramsay	12 years
Rick Bellmore	24 years	Curt Esser	16 years	Darrel Luebke	11 years
John Ponczoch	21 years	Gary Streich	16 years	Al Walschinski	11 years
Donald Tremel	21 years	Richard Hillebrandt	13 years	Martha Paalman	11 years
John Wieland	20 years	Harry Ostendorf	13 years	James Brockhaus	10 years
William Barribeau	15 years	James Smits	13 years	Robert Nackers	10 years
Paul Brusky	15 years	James Wrase	13 years	Keith Siebers	10 years



**Bridget M. Erwin**  
Attorney At Law

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### UWO Accounting Club Meetings

To see the schedule of Accounting Club Meetings, go to: <http://www.uwosh.edu/cob/betaalphapsi/meetings>

- 09/13/17 – Ernst & Young (Clow L104)
- 09/27/17 – Schenck (Sage Hall 1214)
- 10/11/17 – Grant Thornton (Sage Hall 1214)
- 10/24/17 – IMA Student Night (UWO Alumni Welcome Center)
- 10/25/17 – Wipfli (Sage Hall 1216)
- 11/01/17 – CPA Night (UWO Alumni Welcome Center)
- 11/29/17 – PWC (Sage Hall 1214)
- 12/06/17 – Kerber Rose (Sage Hall 1214)

For more info on the UW-Oshkosh Accounting Club Meetings, please contact:

- Amber Beistle – Fall President ([beista53@uwosh.edu](mailto:beista53@uwosh.edu)),
- Ryan Mudge – Spring President ([mudger25@uwosh.edu](mailto:mudger25@uwosh.edu)), or
- Kyle Thibodeau – Secretary ([thibok70@uwosh.edu](mailto:thibok70@uwosh.edu)).

## CPA AND CMA PREP COURSES AT LAKELAND

CPA and CMA professional prep courses are offered online individually or can be combined with other courses to earn an MBA with an Accounting concentration.

Lakeland University's CPA and CMA prep classes feature Wiley CPAexcel and CMAexcel, the official test prep materials of the IMA.

Lakeland offers an accounting program that's been rated one of the nation's ten best online bachelor's degree-earning programs.\*

### CONTACT US!

Call 920-727-0777 or email [PearceAL@Lakeland.edu](mailto:PearceAL@Lakeland.edu) for more information.

\*According to Accounting.com







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in Business

# Meetings at a Glance

Day	Date	Place	Time	Program	Registration Link
Tues	9/19/2017	Liberty Hall	5:30-6:00 6:00-8:00	Dinner Speaker	<a href="https://www.eventbrite.com/e/september-2017-winnipegoland-ima-meeting-tickets-35415617064">https://www.eventbrite.com/e/september-2017-winnipegoland-ima-meeting-tickets-35415617064</a>
Thur	10/5/2017	Lion's Tail Brewery	5:00-6:00 6:00-7:30	Tour Happy Hour/Networking	<a href="http://www.eventbrite.com/e/october-2016-winnipegoland-ima-meeting-tickets-26792691662">http://www.eventbrite.com/e/october-2016-winnipegoland-ima-meeting-tickets-26792691662</a>
Tues	10/24/2017	UWO Alumni Welcome Center	5:00-6:00 6:10-6:40 6:45-8:00	Accounting Fair Dinner Gameshow & CMA Presentation	<a href="https://www.eventbrite.com/e/winnipegoland-ima-student-night-tickets-35442954832">https://www.eventbrite.com/e/winnipegoland-ima-student-night-tickets-35442954832</a>
Wed	11/15/2017	Pierce Manufacturing & Machine Shed	5:00-6:00 6:30-7:00 7:00-8:00	Tour Dinner Speaker	<a href="https://www.eventbrite.com/e/november-2017-winnipegoland-ima-meeting-tickets-35440461374">https://www.eventbrite.com/e/november-2017-winnipegoland-ima-meeting-tickets-35440461374</a>
Tues	12/12/2017	Stone Toad	5:30-6:00 6:00-7:00 7:00-8:00	Dinner Speaker Raffles/Awards	<a href="https://www.eventbrite.com/e/december-2017-winnipegoland-ima-meeting-tickets-35441539599">https://www.eventbrite.com/e/december-2017-winnipegoland-ima-meeting-tickets-35441539599</a>
Tues	1/16/2018	West WI Diner	5:30-6:00 6:00-7:30	Dinner Speaker	<a href="https://www.eventbrite.com/e/january-2018-winnipegoland-ima-meeting-tickets-35441911712">https://www.eventbrite.com/e/january-2018-winnipegoland-ima-meeting-tickets-35441911712</a>
Sat	2/10/2018	TBD	1:00-3:30 3:30-4:30	Movie Discussion	<a href="https://www.eventbrite.com/e/the-accountant-movie-and-discussion-tickets-35442735175">https://www.eventbrite.com/e/the-accountant-movie-and-discussion-tickets-35442735175</a>
Wed	2/21/2018	Darboy Club	5:30-6:00 6:00-7:00	Dinner Speaker	<a href="http://www.eventbrite.com/e/march-2017-winnipegoland-ima-meeting-tickets-26793211216">http://www.eventbrite.com/e/march-2017-winnipegoland-ima-meeting-tickets-26793211216</a>
Tues	3/20/2017	Community First One Menasha Center	5:30-6:00 6:00-7:30	Dinner Speaker	<a href="https://www.eventbrite.com/e/february-2018-winnipegoland-ima-meeting-tickets-35442129363">https://www.eventbrite.com/e/february-2018-winnipegoland-ima-meeting-tickets-35442129363</a>
Wed	4/18/2018	Liberty Hall	5:30-6:00 6:00-8:00	Dinner Speaker	<a href="https://www.eventbrite.com/e/april-2018-winnipegoland-ima-meeting-tickets-35442327957">https://www.eventbrite.com/e/april-2018-winnipegoland-ima-meeting-tickets-35442327957</a>
Tues	5/15/2018	La Sure's	5:30-6:00 6:00-7:00	Dinner Speaker	<a href="https://www.eventbrite.com/e/may-2018-winnipegoland-ima-meeting-tickets-35442387134">https://www.eventbrite.com/e/may-2018-winnipegoland-ima-meeting-tickets-35442387134</a>