

2022 IMA Carolinas Council Fall Conference

Accelerate your learning at the beach
16 Hours of NASBA CPE

HILTON MYRTLE BEACH RESORT
SEPTEMBER 22-23, 2022



The IMA Carolinas Council is registered with the National Association of State Boards of Accountancy (**NASBA #108761**), as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue, Suite 700, Nashville, TN, 37219.



General Conference Information

September 22—23, 2022

- This is the 49th annual conference in Myrtle Beach, and our 6th year at the Hilton Myrtle Beach Resort.
- The Carolinas Regional Council (later Carolinas Council) was founded in 1971 when there were nine chapters in the two Carolinas with approximately 2,000 members. It was the first Council of the twenty-four Councils in the Institute of Management Accountants (IMA) and was chartered in 1975
- **16 hours of CPE (NASBA)** is offered over two days, including 2 hours of ethics.
- The opportunity to expand your professional network by attending the sessions and socializing with other business professionals from the Carolinas and surrounding areas.
- Unique blend of tradition and innovation. Designed to help accounting and finance professionals develop the key competencies needed to become strategic partners within their enterprise
- Hilton Myrtle Beach Resort is once again our host hotel. It offers spectacular views in both the guest rooms and main conference rooms. It has an outdoor pool, fitness facility and the Royale Day Spa.

Friday Social Event

Conference Celebration at the Hilton Resort

For Attendees and their Families (Please review meal prices on Registration Information page)

Social Hour with Cash Bar begins at 6:00 PM and Dinner at 6:30 PM.

Games, Activities and Kids Activities.

Notes

Notes

Registration Information

Registration is now OPEN for the 2022 Fall Conference!

Please visit the website below for hotel and speaker information. We will be updating the site and this brochure as information becomes available so please visit often.

<https://carolinas.imanet.org/>

The 2022 Registration Packages are as follows**:

- All sessions and meals for both days - \$395
- Thursday sessions and meals - \$220 (*Breakfast & Lunch*)
- Friday sessions and meals - \$240 (*Breakfast, Lunch & Dinner*)
- Students – All sessions and meals for both days - \$150
- Students - Thursday **OR** Friday sessions and meals - \$80
- Conference Room Wi-fi 3 MB internet 2 days \$20 (Individual Logins)
Register under merchandise tab
- Conference Room Wi-fi 6 MB internet 2 days \$30 (Individual Logins)
Register under merchandise tab

Additional meal tickets may be purchased during the registration process for friends or family (Breakfast \$20; Lunch \$25; Friday Social \$50. Reduced prices for children.)

Please note, for special conference rate pricing or other matters, please contact **Byrd Heaton.

Registration Policies

CANCELLATION POLICY

If cancelled at least 72 hours before the event, the registration will be reimbursed 100%. If cancellation occurs after that time, reimbursement will be for the CPE hours but not the meals that were purchased. Emergency situations are reimbursable in full.

If you have any questions please contact **Byrd Heaton**.

Contact Information below:

byrd.heaton@gmail.com

704-577-7033

COMPLAINT POLICY

Please contact Byrd Heaton with any problems, concerns or complaints about the conference event. Their contact information is above. Conference evaluation forms will be provided the day of the event.



Thank You to our Sponsors



FORV/S

GLEIM EXAM PREP

Speakers

Darryl Jackson

Director of Diversity, Equity & Inclusion
(DEI)
IMA (Institute of Management Accountants)



As the Director of Diversity, Equity and Inclusion (DEI), Darryl is responsible for oversight of IMA's DEI activities, furthering its commitment to cultivating a more diverse, equitable, and inclusive culture among IMA's members and the accounting and finance profession at large. In his role, Darryl leads IMA's efforts toward creating more opportunities for all accounting professionals and closing a profession-wide diversity gap. Darryl also develops solutions to drive pipeline development, recruitment, and retention in the accounting profession. Certified by Cornell University in Diversity and Inclusion, Darryl employs his philosophy focusing on four primary areas: access, exposure, recognition, and development.

Darryl began his career in government and finance as a loan officer for the U.S. Department of Agriculture and later moved into mortgage loans. After seven years in finance, Darryl pivoted to a career in non-profit and association management, serving as director of membership services and marketing for Alpha Phi Alpha Fraternity; as chapter development specialist for the Project Management Institute (PMI) and as manager of chapter operations and mentoring relations for the National Association for Multi-Ethnicity in Communications (NAMIC) where he worked with organizations such as Comcast, Viacom, ESPN, Charter and Cox Communications to ensure that they were indeed diverse and inclusive behind the cameras, as well as in front of the cameras.

Prior to IMA, Darryl served as director of membership acquisition and engagement with the New York State Society of CPAs and as a senior DEI consultant for Marlon Moore Consulting, where he advised organizations in areas including diversity, inclusion, cultural competence and corporate social responsibility to improve decisions in the development of policy, procedure, products, programs and initiatives.

Darryl is an active member of the American Society for Association Executives (ASAE) and has served on their Committee for Diversity and Inclusion. Darryl received his Bachelors of Science in Agricultural Business and Economics from Virginia State University, where he was a U.S. Department of Agriculture National Scholar, and his Masters of Business Administration from University of Maryland University College in Management. Darryl is a graduate of the U.S. Chamber of Commerce's Institute for Organization Management (IOM), holds ASAE's Certified Association Executive (CAE) certification and was recently recognized by Accounting Today as one of the top 100 most influential people in accounting.

Lodging Information

Hilton Myrtle Beach Resort
1000 Beach Club Drive
Myrtle Beach, SC 29572-5304

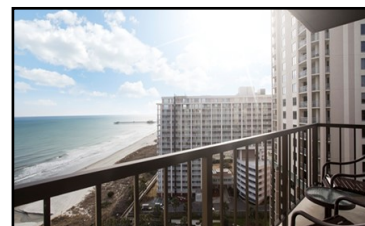
HOTEL PRICES

- \$162 - Ocean View Guest Rooms at the Hilton Hotel
- \$162 - 1 Bedroom Condo Ocean View– Royale Palms located adjacent to Hilton
- \$279 - 2 Bedroom Condo Ocean View– Royale Palms located adjacent to Hilton

To inquire about the group rate, contact **Robin Kociski** at [843.692.3109](tel:843.692.3109) or robin.kociski@hilton.com to inquire about the group rate, as these prices were valid until August 22nd.
The group code is **ICC** to receive the group rate.

There are 2 Hotel Options at the Hilton Resort. All are close or at the Hilton Hotel where the conference rooms will be located.
Free Parking.

Hilton Honors members receive free in-room Wi-Fi.
(Please join Honors before the event)



Conference Agenda

THURSDAY, SEPTEMBER 22, 2022

Start: 7:00 AM End: 8:00 AM	BREAKFAST
Start: 8:00 AM End: 9:40 AM	TITLE: Labor Market Update & Compensation & Benefit Trends SPEAKER: Derek Fuzzell TOPIC/FIELD OF STUDY: Human Resources NASBA CPE AMOUNT: 2 Credits PREREQUISITES: None PROGRAM LEVEL: Basic DELIVERY-METHOD: Group-Live
Start: 9:40 AM End: 10:00 AM	BREAK
Start: 10:00 AM End: 11:40 AM	TITLE: Tax Credits & Incentives SPEAKER: Will Stallings TOPIC/FIELD OF STUDY: Tax NASBA CPE AMOUNT: 2 Credits PREREQUISITES: None PROGRAM LEVEL: Basic DELIVERY-METHOD: Group-Live
Start: 11:40 AM End: 12:00 PM	SPONSOR TIME

50 MINUTES EQUALS 1 HOUR OF CPE



Speakers



Prakash G. Rajan, CMA, CPA, CGMA, CA

Mr. Rajan currently serves as the Head of the Internal Audit function of Kraton Corporation, a multinational specialty chemicals company headquartered in Houston, TX with revenues of \$2 billion employing about 2,000 people and presence in over 20 countries. In this role, he is responsible for managing and ensuring the integrity and effectiveness of Kraton's financial reporting controls as well as the underlying operations, functions and resources including their information technologies. Reporting directly to the Chair of the Audit Committee and being independent of Kraton management, he is also currently responsible for facilitating and monitoring Kraton's enterprise risks including mitigation actions. He is a key player in Kraton's GRC (Governance, Risk & Compliance) infrastructure, being a member of the company's Sustainability Council.

Prior to Kraton, Mr. Rajan has worked for nearly 30 years in public accounting and in senior roles in internal controls, controllership, and risk management. The highlight of his career is his significant international as well as US regional experiences and his expertise in Governance, Compliance, Ethics & Risk Management. With formative education in India, he has an MBA from Drexel University and is a Certified Management Accountant and a Certified Public Accountant.

He has been a member of the IMA for 32 years. He has served in IMA's Committee of Ethics (CoE) for the past 5 years including in the capacity of the Vice-Chair of the CoE in the 2022 fiscal year. He is currently serving as the Chair of this committee.

The CoE reporting to the Governance Committee of IMA's Global Board of Directors is an important cog in IMA's ethical outreach and foundation. The CoE supports IMA's strategic goals by encouraging, exhorting, and advocating the highest ethical principles with the IMA members and the organizations that these members serve to adopt, promote, and execute superior business practices in management accounting and finance consistent with IMA's mission and IMA's Statement of Ethical Professional Practices.

Speakers

Tony Caspio

Vice President-Supply Chain, Global Equipment for Sealed Air Corporation



Tony serves as a Vice President-Supply Chain, Global Equipment for Sealed Air Corporation, a Fortune 500 company headquartered in Charlotte, NC USA with 2021 sales of \$5.5B and approximately 16,500 employees serving customer in 112 countries or territories.

Prior to this role, he served as a Vice President in Supply Chain overseeing global strategic programs and various senior finance leadership roles including global supply chain finance and global division finance for two different divisions of Sealed Air. During his 25 year career at Sealed Air, Tony has also served on the board for two joint ventures, one in Spain and another in Turkey and has been involved in several business development activities, both acquisitions and divestitures.

Tony recently finished nine consecutive years of global service for the Institute of Management Accountants. During this time he served eight years as a global director, including one year as the Strategic Planning Committee chair, and one year as the Annual Program chair. For the past 25 years he has also held leadership positions at the chapter and council level for the IMA. He has also served the community for multiple years as a board member of the United Way of the Piedmont and several property or homeowners associations.

Tony earned his Accountancy Bachelor of Business degree from Western Illinois University and is a Certified Management Accountant.



Conference Agenda

THURSDAY, SEPTEMBER 22, 2022

Start: 12:00 PM
End: 1:00 PM

LUNCH

Start: 1:00 PM
End: 2:40 PM

TITLE: Lessons in Leadership
SPEAKER: Mark Bonney
TOPIC/FIELD OF STUDY: Leadership
NASBA CPE AMOUNT: 2 Credits
PREREQUISITES: None
PROGRAM LEVEL: Basic
DELIVERY-METHOD: Group-Live

Start: 2:40 PM
End: 3:00 PM

BREAK

Start: 3:00 PM
End: 4:40 PM

TITLE: Cyber Security Awareness, Strategy and Best Practices
SPEAKER: Sean Hare & Michael Maloney
TOPIC/FIELD OF STUDY: Technology– Cybersecurity
NASBA CPE AMOUNT: 2 Credits
PREREQUISITES: None
PROGRAM LEVEL: Basic
DELIVERY-METHOD: Group-Live



50 MINUTES EQUALS 1 HOUR OF CPE

Conference Agenda

FRIDAY, SEPTEMBER 23, 2022

Start: 7:00 AM End: 8:00 AM	BREAKFAST
Start: 8:00 AM End: 9:40 AM	TITLE: Risk Management for Accounting & Finance Professionals SPEAKER: Rick Thompson TOPIC/FIELD OF STUDY: Business Management & Organization NASBA CPE AMOUNT: 2 Credits PREREQUISITES: None PROGRAM LEVEL: Basic DELIVERY-METHOD: Group-Live
Start: 9:40 AM End: 10:00 AM	BREAK
Start: 10:00 AM End: 11:40 AM	TITLE: Adding Value During Unprecedented Times SPEAKER: Tony Caspio TOPIC/FIELD OF STUDY: Management Services-Technical NASBA CPE AMOUNT: 2 Credits PREREQUISITES: None PROGRAM LEVEL: Basic DELIVERY-METHOD: Group-Live
Start: 11:40 AM End: 12:00 PM	SPONSOR TIME

50 MINUTES EQUALS 1 HOUR OF CPE



Speakers



Rick S. Thompson, CMA, CFM, CPA, CFE, CTP

Retired Sr. VP Finance, Secretary & Treasurer

Pacolet Milliken Enterprises, LLC

Rick Thompson recently retired as the Sr. VP Finance, Secretary and Treasurer of Pacolet Milliken, a privately held real estate, energy and investment company headquartered in Greenville, SC. He has served in this position or in the Chief Financial Officer's role of this rapidly growing Company since working with Mr. Roger Milliken to form this Company in 2007.

Prior to joining Pacolet Milliken, he was a 28 year associate of Milliken & Company where he assumed a number of significant roles including Corporate Director for Product Management Improvement, Finance Team Leader for Enterprise Resource Planning, Manager of Global Systems Integration, Financial Reporting Manager, Corporate Cost Manager and Industrial Engineer at five different manufacturing locations.

In 1997, Mr. Thompson completed Duke University's Advanced Management Program. He holds a Master of Accountancy degree from Gardner-Webb University, is a Certified Management Accountant, Certified Financial Manager, Certified Public Accountant (CPA - licensed in NC), Certified Internal Auditor, Certified Treasury Professional and a Certified Fraud Examiner. Mr. Thompson is also a Distinguished Toastmaster.

He has served as President of the Carolinas Council of the Institute of Management Accountants and has served on IMA's Global Board of Directors for 11 years. Mr. Thompson is the past Chair of the Board of Regents of the Institute of Certified Management Accountants. He was awarded IMA's 2015 Exemplary Leadership Award and IMA Global 2021 Exemplary Board Member Award. He has served as Committee Chairs of IMA's Volunteer Leadership Committee and the Strategic Planning Committee.

Speakers

Michael Maloney, CISM

Director, Network Administration
IMA (Institute of Management Accountants)



Mike has been working in the “IT trenches” for as long as he can remember. His work experience in IT started when he was in high school, stretches more than 35 years, and encompasses many different organizations and industries. He’s worked with everyone from small “mom & pop” type shops and practices, to educational institutions, and various Fortune 500 companies - eventually landing at the Institute of Management Accountants.

At the IMA, Mike is the Director of Network Administration and has global responsibility for IMA’s networks, phone systems, and servers. He is also the staff liaison to the Technology Solutions & Practices committee.

When not doing IT related activities, Mike enjoys restoring his relatively low-tech 120 year-old Victorian home.

Conference Agenda

FRIDAY, SEPTEMBER 23, 2022

Start: 12:00 PM
End: 1:00 PM

LUNCH

Start: 1:00 PM
End: 2:40 PM

TITLE: Ethics-House Out of Control

SPEAKER: Prakash G. Rajan

TOPIC/FIELD OF STUDY: Ethics

NASBA CPE AMOUNT: 2 Credits

PREREQUISITES: None

PROGRAM LEVEL: Basic

DELIVERY-METHOD: Group-Live

Start: 2:40 PM
End: 3:00 PM

BREAK

Start: 3:00 PM
End: 4:40 PM

TITLE: Diversifying Global Accounting Talent:

Actionable Solutions for Progress

SPEAKER: Darryl Jackson

TOPIC/FIELD OF STUDY: Diversity, Equity & Inclusion

NASBA CPE AMOUNT: 2 Credits

PREREQUISITES: None

PROGRAM LEVEL: Basic

DELIVERY-METHOD: Group-Live



50 MINUTES EQUALS 1 HOUR OF CPE

Learning Objectives

Labor Market Update & Compensation & Benefits Trends

Derek Fuzzell

By the end of the session, attendees will understand the Current Trends in the Labor Market, understand the Impacts of the Great Resignation, receive a forecast of the Year Ahead and review Compensation & Benefit Trends which may be expected to continue into 2023.

Tax Credits & Incentives

Will Stallings

By the end of the session, attendees will understand the legislative background, qualification criteria, process for claiming, and documentation requirements for the following tax credits: (i) Employee Retention tax credits, (ii) Research & Development tax credits, (iii) Energy efficiency tax credits, and (iv) Negotiated credits & incentives.

Lessons in Leadership

Mark Bonney

By the end of the session, attendees will understand lateral thinking, leadership skills, what works best up, down, and across the organization.

Cyber Security Awareness, Strategy, and Best Practices

Sean Hare and Michael Maloney

By the end of this session, attendees will review an overview of the state of cyber security as a daily presence, understand cybercrime is a growth industry and how your organization is exposed to it everyday and identify cyber threats and know what the individual can do in both the work and home and environment to minimize the risks.

Speakers



Sean Hare, CAE, CGEIT

Vice President Information Technology & Operations

Certified ITIL® Expert

IMA (Institute of Management Accountants)

As Vice President, Information Technology and Operations for IMA, Sean is responsible for information technology programs and strategy, U/X systems development, data/cyber security and risk management, data privacy, network and helpdesk management, and disaster recovery and business continuity. He is also responsible for capital improvements, space management, and maintenance of the Montvale building.

Sean's prior positions include Managing Director at Grafica Interactive responsible for digital technology development and consultative services to Fortune 500 companies including AT&T, Verizon, and Motorola. He also held several technology and management positions with Prudential in his 13-year tenure with them.

Sean is a Certified ITIL Expert and is also Certified in the Governance of Enterprise IT (CGEIT).

Speakers

Mark Bonney



Mark J. Bonney has over 35 years of experience as a board member, CEO and CFO in middle market technology companies, both in the United States and abroad. Mr. Bonney has a long history of dramatically increasing value in both public and private enterprises. Today, through Mr. Bonney's company, On Board Advisors, LLC, Mr. Bonney is focused on public and private company board service, financial and strategic advisory work, investments and philanthropic endeavors.

Mr. Bonney currently serves on the board of Tile Shop Holdings (NASDAQ:TTSH), a manufacturer and retailer of custom tiles and accessories. Mr. Bonney chairs both the Audit Committee and the Independent Transaction Committee and is a member of the Compensation Committee.

Mr. Bonney is currently an advisor to BatteryStreak, Inc. (BSI). BSI designs, develops, and manufactures super-fast charging batteries made from niobium. He is also an advisor to CeCN LLC, a private company doing business under the name ConferMed that facilitates electronic medical consults from specialists to primary care physicians.

During his career, Mr. Bonney has been a public company CFO five times, a COO or CEO six times and has sat on thirteen boards, eight public companies and five private companies. He has chaired three boards, six audit committees, two compensation committees and three special committees.

Additionally, Mr. Bonney was founder and Chairman of the Angel Investor Forum, Inc., (AIF). AIF provides seed stage capital and leadership support to early stage companies in the northeast. During his tenure, AIF grew from its two founders to 80 members and made investments in over twenty-five early-stage companies.

Learning Objectives

Risk Management for Accounting and Finance Professionals

Rick Thompson

By the end of the session, attendees will recognize the importance of risk management principles as a foundation for decision making as the current economic environment enters a recession . . . when, not if, identify the six key types of risks associated with processes and work with the management team to create appropriate risk management and mitigation plans, understand the corporate culture and tolerance for risk to create a framework for decision making regarding the 10 biggest risks for 2022 and become a more effective trusted advisor to the senior leadership team and train others to protect stakeholder interests. Participants will be provided with several cases involving business risk management and proposed resolutions during class break-out sessions.

Adding Value During Unprecedented Times

Tony Caspio

By the end of the session, attendees will understand the type of events that have affected global businesses the past few years, understand the importance of business continuity planning and the key aspects of business continuity planning, be aware of the linkage of business continuity planning to the enterprise risk management process and learn what role finance professionals can play in the business continuity planning process and how they can add value during a crisis or major business disruption.

Ethics—House Out of Control

Prakash G. Rajan

By the end of the session, attendees will be able to recognize the importance of having internal controls in nonprofit organizations with small staffs, examine the investigative process of reviewing and gathering data, identify how to deal with conflict situations when having to report to different persons of authority and determine how the ethical standards outlined in the IMA Statement of Ethical Professional Practice provide valuable guidance when faced with ethical decisions.

Diversifying Global Accounting Talent: Actionable Solutions for Progress

Darryl Jackson

By the end of this session, attendees will be able to grasp the current state of DEI in accounting, identify and understand the catalysts for DEI Action and identify and understand actionable DEI solutions.

Speakers

Derek A. Fuzzell, CMA, CSCA CPA

Vice President – Finance/Treasurer,
Northwest Federal Credit Union



Derek Fuzzell serves as the chief financial and strategy officer of PAHO/WHO Federal Credit Union in Washington, D.C., which provides financial services to the global health community, Georgetown University, and the MedStar Healthcare System. In his role, he oversees Finance, Accounting, Mortgage Lending, Human Resources, Business Development, Strategic Planning, and Wealth Management Services. Fuzzell also serves on the Board of Directors for Vizo Financial Corporate Credit Union and the D.C. Chapter of the Maryland/D.C. Credit Union Association.

As a member of the IMA Global Board, Fuzzell serves as Chair of the Volunteer Leadership Committee and the Governance Committee. He previously served on the Performance Oversight and Audit, Strategic Planning, and Nominating Committees. Fuzzell served as chair of the Investment Subcommittee for 2018-2019, chair of the Conference Program Committee for 2017-2018, and chair of the DE&I Committee from 2019-2021. Fuzzell has served as a Chapter and Council Leader for the Nation's Capital Chapter and the Potomac and Chesapeake Council. He was the 2020 recipient of IMA's Exemplary Global Board Member Award and the 2018 recipient of IMA's Exemplary Young Professional Award.

Fuzzell earned his MBA from Virginia Polytechnic Institute and State University (Virginia Tech) and his bachelor's degree in economics from the University of Houston. He is a CMA, CSCA, and a CPA licensed in the Commonwealth of Virginia.

Speakers

Will Stallings, CPA

Senior Tax Manager



Will Stallings is a senior manager in the federal tax specialty services group in the firm's Charleston, SC office, with over eight years of experience in the area of research and development tax credits and tax mergers and acquisitions. He has worked with both public and private companies across many industries, including manufacturing, technology, retail, and software, building research tax credit claims as well as defending these claims under IRS scrutiny. Within tax M&A, Will focuses on leading a multitude of transaction-related tax services for the firm.

Professional & Civic Involvement

American Institute of Certified Public Accountants
South Carolina Association of Certified Public Accountants

Licenses & Certifications

SC Certified Public Accountant #9039

Education

University of South Carolina, Master of Accountancy in Taxation
University of South Carolina Honors College, Bachelor of Science - Accounting