

March 2018

March 2018 Chapter Activities

Chapter Meeting Tuesday, March 20th at the DoubleTree by Hilton Dallas Near the Galleria, 4099 Valley View Lane, Dallas

- ◆ Down with Drama! Up with Leadership!: The Three Vital Questions for Empowerment by Lori Darley, founder and CEO of Conscious Leaders LLC
- ◆ Transfer Pricing by Scott Smaistrila, CMA, CPA, Director, WTP Advisors

Click [here](#) for more information contained in this newsletter.

Networking Happy Hour

Thursday, March 29th, 5:30 PM

Village on the Parkway
5100 Beltline Road, #500, Addison

Click [here](#) for more information



Student Important Dates—MARCH 10th

Scholarship Opportunities for students . For more information click [here](#) contained in this newsletter.

Young Professionals Baseball Night —April 5th

Come join the Dallas Fort Worth Area Chapter of the IMA root on the Frisco RoughRiders at their season opener against the Tulsa Drillers. The event is open to IMA members and prospective members. Click [here](#) for more information.

IMA Strategic Goals

- Create superior member value
- Increase the penetration of the CMA exam
- Grow membership

Texas Regional Council

The Council is comprised of the 5 Texas IMA Chapters – Austin Area, Dallas Fort Worth Area, El Paso, Houston and San Antonio. For more information, go to <http://texascouncil.imanet.org/home>

New Accounting Honor Society

The University of North Texas at Dallas IMA Accounting Honor Society will induct the following students on Thursday, March 8th.



Last	First
Bowie	Bryan
Cano	Iliana
Carlow	Yeini
Cole	Dawn
Dejeus Perez	Adriana
Diaz	Maria
Frazier	Sidney
Garcia	Marybel
Graves	Karen
Henry	Desmond
Linares	Fidelina
Lopez Vargas	Jamie

Last	First
Martinez	Maria
Martinez	Patricha
Medina	Jessica
Montoya	Yartiza
Muniz Ornelas	Betty Ann
Ojo	Akindamola
Robles	Lorena
Rodriguez	Sonia
Ross	Shaniqua
Vasquez	Micah
Vilchis	Diana
Walker	Fawn

Dallas Fort Worth Area Chapter Members Serving at Global Level and Texas Council

Global

- Former Chair/Global Board – John Macaulay
- Global Director, Global Board – Jimmie Smith
- Member Relations Committee – Jimmie Smith
- Planning and Development Committee – John Macaulay
- IMA Leadership Academy Committee - Daniel Smith
- Stuart Cameron McLeod Society (SCMS) Board of Governors Secretary – MaryValerie Reeves
- Stuart Cameron McLeod Society (SCMS) Board of Governors Treasurer – Pat Wynn
- Committee on Academic Relations (CAR) - Bruce W. Runyan
- Diversity and Inclusion Advisory Committee – Jimmie Smith
- Small Business Advisory Committee - Jeremy Smallwood

Texas Council

- Chapter Delegate – Lorna Winston-Blanks
- President Elect – Nancy Hudnall
- Treasurer – Lorna Winston-Blanks

Scholarship Money — Don't let the

deadline pass you by!!

Are you attending college and haven't enough savings to cover next year's costs? Have you applied for an IMA Memorial Education Fund (MEF) Scholarship AND Stuart Cameron & Margaret McLeod Memorial Scholarship (SCMS)? If so, send a copy of your application along with your transcript and recommendations to the [Walter Massie Memorial Education Fund](#) or e-mail your information to: scholarships@dallasima.com.



If you have not completed your application you still have a time before the deadline. [Apply](#) here. The deadline is March 10, 2018. And when you apply for the MEF scholarship you are automatically considered for the SCMS scholarship of \$5,000. The chapter's Walter Massie Memorial Education Fund follows the guidelines of IMA Global with the exception of the accounting focus requirement if you are a child of a Dallas Fort Worth Chapter member. So parents of college students not focusing on accounting have your child apply by use the same application –they will use your IMA number and write “parent” behind it AND not send to Montvale. Do you have any questions? Call 214.704.1159.

Remember the deadline is March 10, 2018!!!

Free NASBA and TSBPA Approved High Quality CPE Webinars Available for IMA Members

Take advantage of IMA's Free (to IMA Members) High Quality CPE (NASBA and TSBPA Approved) Inside Talk, Leadership Academy, and Internal Control Series Webinars

Inside Talk

- March 21, 2018 (12:00 PM) – Building a Team of Month-End Masters (1.0 CPE)
- March 28, 2018 (12:00 PM) – Machine Learning Forecasting: The Future of FP&A?

Leadership Academy

- March 06, 2018 (12:00 PM) – Diversity and Inclusion (1.5 CPE)
- April 03, 2018 (12:00 PM) – Mindset of High-Performance Leaders (1.5 CPE)

Register at <https://www.imanet.org/education-center/webinars?ssopc=1>

Member Profile Updates Please keep your contact information up to date so that you can continue to receive communications from the Dallas Fort Worth Area Chapter or IMA.

To update your information, either contact IMA Customer Service at 800-638-4427 or go online to your profile at <http://www.imaonlinestore.com/PersonifyEbusiness/Default.aspx?TabId=61> (user ID and password are required).

If you would like to change your membership into the Dallas Fort Worth Area Chapter or to another chapter, contact IMA Customer Service at 800-638-4427 or go online to your profile at <http://www.imaonlinestore.com/PersonifyEbusiness/Default.aspx?TabId=61> (user ID and password are required).

Honoring our Extraordinary Volunteers

Nominate someone special for an IMA Global Award

Dedicated volunteers are the heart of IMA® (Institute of Management Accountants) – and why we've achieved so much in our nearly 100 years of service to the management accounting profession. Help us recognize members who exemplify this spirit, who empower others and the profession through their service, leadership, and innovation. We invite you to nominate outstanding volunteers for these prestigious IMA Global Awards:

- → **IMA Champion:** provides volunteer service "above and beyond the call of duty"
- → **Exemplary Board Member:** serves as an example for all Board members to follow
- → **Lifetime Achievement Award:** shows extraordinary leadership and dedication to IMA over a lifetime of service
- → **Exemplary Young Professional:** displays an "outstanding and creative approach to problem solving"

Note: IMA will not accept self-nominations. All nominators will be required to answer six essay questions about their nominee as well as submit a résumé and application form. **Visit the IMA website to see complete nomination criteria and nomination forms.**

Get Noticed



The Dallas Fort Worth Area Chapter of IMA has developed a Sponsorship Program, where firms can promote themselves to our members, guests and many others in a variety of ways (your logo on the Home Page of our website with a link to your website, your logo in our monthly newsletter, recognition at our monthly meetings, etc). Contact [Jimmie Smith](#) for more information on the program, including the various levels of sponsorship.

Also, please go to the Home Page of our website at <http://dfw.imanet.org/home> to see where your logo will be prominently displayed to our members, guests and many others who visit the site. To see IMA's Global Membership Profile, go to <https://www.imanet.org/>.

The Dallas Fort Worth Area Chapter is one of IMA's (Institute of Management Accountants) most active and recognized chapters, with over 900 members. We have monthly meetings (CPE credits), high quality speakers, networking sessions, college faculty and student initiatives, CMA (Certified Management Accountant) exam preparation courses and more. We would welcome the opportunity to partner with your firm, and help you promote it to Dallas Fort Worth accounting and finance professionals.



www.mamrecruiting.com



Please contact Nikki Thirasant-Meyer ([Nicole Thirasant-Meyer@oxy.com](mailto:Nicole.Thirasant-Meyer@oxy.com)) if you have any questions, or need additional information.

Dallas Fort Worth Area Chapter

2018-19 Nominations

President	Joe Baze
President-Elect	
Secretary	Noel Kaiboni
Treasurer	Nikolaus Fahrer
Administration Team Lead	
Director, Meeting Arrangements	Vernon Evans
Director, Member Attendance	Diana Cooper
Communications & Public Relations Team Lead	MaryValerie Reeves
Professional Education Team Lead	Jimmie Smith
Director, Academic Relations	Jimmie Smith
Director, Young Professionals	Rory Guthrie and Chris Carr
Director, CMA Certification	
Director, CPA CPE Compliance	MaryValerie Reeves
Membership & Marketing Team Lead	Manasseh Sarpong
Director, Corporate Development	Jimmie Smith
Texas Council Delegate	Manasseh Sarpong
Texas Council Delegate	Joe Baze
Alternate Texas Council Delegate	
Chair, Long Range Planning Committee (1)	Lorna Winston-Blanks
Member, Long Range Planning Committee (1)	Jimmie Smith
Member, Long Range Planning Committee (1)	
Member, Long Range Planning Committee (1)	
Member, Long Range Planning Committee (1)	

Elections will be held at the March 20th Dinner meeting. Nominations from the floor will be accepted at that time, prior to the election. Anyone having questions regarding the positions or nominations should contact Christina Romero, Nominating Committee Chair.

The Long Range Planning Committee will also serve as the Nominating Committee

Team Members and Coordinators (appointed)

Member Attendance Team	
Member Attendance Team	
Employment Coordinator	Jimmie Smith
Community Service Coordinator	Drew Mohr
Webmaster	Stephanie Carpenter
Education Team	Mary Ann Markowitz
Education Team	
Education Team	
Academic Relations& Student Affairs Coordinator	
Academic Relations& Student Affairs Coordinator	
Academic Relations& Student Affairs Coordinator	
Young Professionals Coordinator	
Networking Events Coordinator	Rory Guthrie
Networking Events Coordinator	

2018 Habitat for Humanity Walk-a-Thon

Dallas Fort Worth Area IMA Chapter Participates in 2018 Habitat Walk-A-Thon



Drew Mohr, Dallas Fort Worth IMA chapter Community Service Coordinator after completing the five mile walk which had to be postponed until the afternoon due to rain.

The Dallas Fort Worth IMA chapter participated in the Richardson Area Interfaith Habitat Walk-A-Thon on Saturday, February 24, 2018. The five-mile walk is an annual event to raise money for the Dallas Area Habitat for Humanity. The current cost of a Habitat house in Dallas is \$80,000, that means a lot of donations and walkers are needed. The walk is held in the neighborhood adjacent to the east side of the University of Texas-Dallas campus in Richardson. The chapter appreciates the support from members who contributed \$510.

The Dallas Fort Worth Area IMA Chapter will meet Tuesday, March 20th at the DoubleTree by Hilton Dallas Near the Galleria, [4099 Valley View Lane, Dallas](#)

- 5:15 PM Registration for Professional Development Session
- 5:30 PM Professional Development Session – Down with Drama! Up with Leadership!: The Three Vital Questions for Empowerment by Lori Darley, founder and CEO of Conscious Leaders LLC
- 6:20 PM Registration for Technical Session and Networking
- 6:45 PM Dinner
- 7:20 PM Announcements
- 7:30 PM Technical Session – Transfer Pricing by Scott Smaistrle, CMA, CPA, Director, WTP Advisors
- 8:20 PM Adjournment

Two (2) CPE hours for both CMAs and CPAs are provided. Attendees **must sign in and out and be present for the presentation in order to receive CPE credit**. CPE certificates will be sent in an email for those who have met the requirements.

Dallas Fort Worth Area IMA is a registered CPE sponsor with the Texas State Board of Public Accountancy (TSBPA). This registration does not constitute an endorsement by the board as to the quality of our CPE program.

Registration by 12:00 Noon, Friday, March 16th

- Members/Guests, please register at <http://dfw.imanet.org/events/recentcommunityeventsdashboard>
- Cancellation, please e-mail reservations@dallasima.com as soon possible. Refunds will not be made for cancellations made after 12:00 noon on Friday, March 16th. If you do not cancel prior to the deadline, you will not receive a refund for the event. You may alternatively send someone in your place by notifying reservations@dallasima.com.

Cost - Dinner Meeting

- \$37 members with reservations and payment by 12:00 Noon, March 16th, and \$42 for registration after the deadline and/or payment at the door
- \$45 guests with reservations and payment made by 12:00 Noon, March 16th, and \$50 for registration after the deadline and/or payment at the door
- \$20 students with reservations and payment made by 12:00 Noon, March 16th, and \$25 for registration after the deadline and/or payment at the door
- Payment - Cash or check only at the door or in advance by credit card at <http://dfw.imanet.org/events/recentcommunityeventsdashboard>

Menu

- | | |
|---|--|
| • Chef's Selection of Salad | • Garlic Breadsticks |
| • Italian Beef Lasagna | • Chef's Selection of Dessert Freshly |
| • Chef's Selection of Appropriate Seasonal Vegetables | Brewed Regular and Decaffeinated Coffee, Iced Tea, and Water |

Professional Development Session - Down with Drama! Up with Leadership!: The Three Vital Questions for Empowerment by Lori Darley (founder and CEO of Conscious Leaders LLC)

In this session, attendees will learn how to be an empowered, dynamic leader. This program will consist of a presentation, requiring no advance preparation.

Prerequisites: None

About the Speaker:



As founder and CEO of Conscious Leaders LLC, Lori Darley brings nearly two decades of experience as a transformational coach and consultant to the conscious business movement. She is also the author of the book, *Dancing Naked: Claiming Your Power as a Conscious Leader* which made the Amazon Best Seller in Women in Business category and #2 in Hottest New Releases on launch day.

Lori is seasoned in the needs of a full range of decision makers and works extensively with C-suite executives in many industries. She coaches organizations from multi-national corporations, such as Ferro Chemical and a Fortune 500 "Class One" rail transportation company, to entrepreneurial ventures and individuals in non-profits, manufacturing, financial services, management consulting, commercial real estate and the arts. She also serves as Senior Consultant with Blue Case Strategic Partners.

Lori has presented at numerous conferences including Conscious Capitalism's national conference, the Young Leaders of the Americas Initiative (a U.S. State Department program invitational of over 250 Latin American entrepreneurs) and the Social Venture Network. She has also spoken at the SVN Europe conference, been a panelist the local Dallas chapter of Conscious Capitalism and presented at Renaissance Weekend.

Lori is a certified somatic coach, recognized by the Strozzi Institute, and a certified Peak Potentials trainer. Additional certifications include Ken Blanchard's Situational Leadership, Gallup Strengths-Finder, EQi-2 (an Emotional Intelligence assessment and 360 feedback model) and the Myers-Briggs Type Indicator.

Lori co-founded a professional modern dance company, in which she also served as Artistic Director, choreographer, and a highly acclaimed dancer. She was a professional dancer with her company until the age of forty-three, when she emerged from that stage of her career as a leader in the arts community. Lori now brings the wisdom gleaned from years of non-profit leadership and artistic directorship to the halls of business.

Lori believes that within the heart of everyone lives a creative genius, and that each of us yearns to connect authentically with one another so we can make a positive difference in the world.

Technical Session - Transfer Pricing by Scott Smaistrila, CMA, CPA (Director, WTP Advisors)

In this session, we will discuss best practices in transfer pricing. This program will consist of a presentation, requiring no advance preparation.

Prerequisites: None

About the Speaker:



Scott Smaistrila, a WTP Advisors, Director, has extensive expertise in international transfer pricing and tax, corporate finance, operations and compliance with a world class track record for leadership and innovation. His transfer pricing career has encompassed guidance to executive level decision makers in the areas of transfer pricing planning & contemporaneous documentation, operational transfer pricing, audit defense, analytics, compliance, process improvement, international tax structuring, product development/management, and risk mitigation.

Scott brings over twenty cumulative years of experience including tenures with global accounting firms PricewaterhouseCoopers and Grant Thornton. Scott has also served in influential corporate financial/operational leadership roles with multinational industry segment leaders Schlumberger, Baker Hughes, Motorola, Siemens and Thomson Reuters. Scott also believes in giving back to the community. He has served on the Campaign Cabinet for the United Way of Metropolitan Dallas (2011-2014). Scott currently serves on the Board of the Directors for Housing Crisis Center (Dallas) and Financial Executives International - Dallas Chapter where he is also a member.

Skill Set/Experience

- International Transfer Pricing - Planning, Documentation, Operational Transfer Pricing, Intangible Property Migrations, Permanent Establishment, Competent Authority, Team/Project Management, Royalty Calculations, Audit Defense, Global Headquarter/Region Management/Shared Services Cross Charge Methods, BEPS, APAs, Intercompany Contract Database Development and Maintenance, and International Tax Structuring and Research. Global Experience with "In Country" projects in North America, Europe, Africa, and Asia; Forecasting, Budgeting, Variance Analysis, and Close Accounting; Business Analytics and Mergers & Acquisitions due diligence

Education and Certifications

- Master of Business Administration Kelley School of Business at Indiana University (Bloomington)
- Bachelor of Business Administration, The University of Texas at Austin
- Certified Public Accountant, Texas State Board of Public Accountancy
- Certified Management Accountant, Institute of Management Accountants



Welcome New Members

Shivam Arora, Student

Cevin Calame, Student

Mrs. Rebecca Promise Chacko, Student

Ms. CHEN CHE

Madison Clevenger, Student

Mi Dai

Mr. Shengzhe Fan

Mr. Alonzo Miguel Garcia, Student

Mr. Andrew Herwald, Student

Ms. Sheryl R Holmberg

Rachel Huang

Joel Peniel, Student

Mr. LUIS A. PEREZ, Student

Mr. Dhruvesh Photawala, Student

Welcome Transfers from Other Chapters

Check back next month

Congratulations to our New CMAs

Check back next month

Congratulations to our New CSCAs

Check back after next testing period



ARE YOU AN INFLUENCER?

IMA's Campus Influencers program offers students insights on careers, including the variety of career paths in accounting and finance as well as how IMA and the CMA certification can support and strengthen their careers. Learn more at <http://sfmagazine.com/post-entry/august-2016-are-you-an-influencer/>.

The Dallas Fort Worth Area Chapter is looking for members willing to help reach out to area universities to share information on management accounting as a career, student resources available from IMA, and the CMA. If you are interested or need more information, contact Jimmie Smith at Jimmie.Smith.HillsofLlano@gmail.com.

2017-18 Leadership Team

Board Members - Officers and Directors

President	Lorna Winston-Blanks
President Elect	Joe Baze
Secretary	Nikki Thirasant-Meyer
Treasurer	Nik Fahre
Administration Team Lead	Joe Baze
Director, Meeting Arrangements	Vernon Evans
Director, Member Attendance	Diana Cooper
Communications & Public Relations Team Lead	Ernie Robinson
Professional Education Team Lead	Mary Ann Markowitz
Director, Academic Relations	Jimmie Smith
Director Young Professionals	Rory Guthrie
Director Young Professionals	Chris Carr
Director Young Professionals	Manasseh O. Sarpong
Director, CMA Certification	Ron Schmidt
Director, CPA CPE Compliance	MaryValerie Reeves
Membership & Marketing Team Lead	Martha Gibson
Director, Corporate Development	Jimmie Smith
Texas Council Delegate	Lorna Winston-Blanks
Chair, Long Range Planning Committee	Christina Romero

Team Members and Coordinators

Community Service Coordinator	Drew Mohr
Education Team	Jimmie Smith
Employment Coordinator	Jimmie Smith
Networking Events Coordinator	Rory Guthrie
Networking Events Coordinator	Christina Romero
Webmaster	Stephanie Carpenter

Long Range Planning Committee

Chair, Long Range Planning Committee	Christina Romero
Member	Stephanie Carpenter
Member	MaryValerie Reeves
Member	Ron Schmidt
Member	Jimmie Smith
Member	Nikki Thirasant-Meyer



**Contact us for more information about our services
and products**

**Dallas Fort Worth Area IMA Chapter
PO Box 612084
Dallas, Texas 75261**

<http://dfw.imanet.org/home>

<http://bit.ly/DallasAreaIMALinkedIn>

https://twitter.com/IMA_DFW



Member Roster

Dallas Fort Worth Area Chapter members can benefit from networking with other members of the chapter.

To connect with other chapter members or find chapter members who work at companies of interest:

- Go to www.imanet.org
- Login with your member ID and IMA password,
- Click on Groups and Networking
- Click on LinkUp IMA
- Select Communities then My Communities
- Select Dallas Fort Worth Area Chapter (only available to chapter members),
- Select Enter.

You can also click on Members at the top of the page to search the data base by first name, last name and/or company.