



The Association of
Accountants and
Financial Professionals
in Business

DALLAS FORT WORTH AREA CHAPTER

February 2019

THE F.A.N. FINANCE & ACCOUNTING NEWS YOU CAN USE

CHAPTER DINNER MEETING

When: February 19, 2019 5:30 PM to 8:30 PM

Where: DoubleTree by Hilton Dallas Near the Galleria



Professional Development Session: Tax **Reform: What is it good for?** Presented by Jason Lunte

Objectives:

- ◆ Review the origins, unique factors and limitations that were in place that help explain how tax reform was born.
- ◆ Learn the impact that entity selection can have on your effective tax rate
- ◆ Learn how the new pass-through deduction under Section 199A represents a significant change in the taxation of pass-through entity owners

Field of Study: Taxation, **Prerequisites:** None

Technical Session: **International tax provisions of the Tax Cuts and Jobs Act – Where are we now?**

Learn how U.S. taxpayers with international activity can effectively manage their tax structures in a new era of U.S. taxation

Focus:

- ◆ Section 965 Transition Tax,
- ◆ Participation exemption deduction (DRD)
- ◆ Foreign-Derived Intangible Income (FDII)
- ◆ Global Intangible Low-Taxed Income (GILTI)

by Kevin Kao (Manager - International Tax Services at RSM US LLP) and



Jacob Booth, CPA (Manager - International Tax Services at RSM US LLP) .

Field of Study: Taxation, **Prerequisites:** None



For more information and to register click [here](#) .

Dallas Fort Worth Area IMA Networking Happy Hour

Join us on Thursday, February 28th for our monthly **Happy Hour at Lazy Dog Restaurant, 5100 Belt Line Rd Suite 500 in Addison**. With a menu full of great treats, you'll enjoy not only the food and drinks, but great atmosphere as well.

The event starts at 5:30 pm and goes until 8:00 pm. Appetizers will be served; drinks are on you.

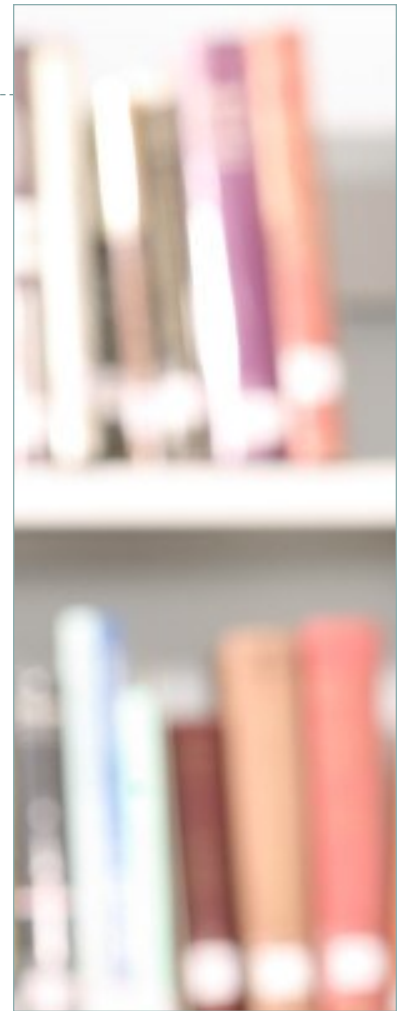
This is a great opportunity to meet fellow members of the IMA, as well as other DFW accounting and finance professionals and recruiters in a relaxed, fun setting.

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CHAPTER DATES TO REMEMBER

- **February 19**—Chapter Dinner Meeting
DoubleTree Near the Galleria Federal
Tax Update
- February 23—Community Service - -
Habitat for Humanity Walk @ UTD
- February 28 — NetWorking Lazy Dog
Restaurant, 5100 Belt Line Road Addison





OUR FEBRUARY SPEAKERS

Jason Lunte joined RSM (through a predecessor firm) in 2005 as a member of the financial services department focusing on hedge funds, fund of funds, proprietary trading firms and private equity funds.

During 2008-2011, he worked at a global financial services firm where he supervised the preparation and review of tax returns and workpapers, including K-1 preparation and allocation issues. He also handled issues in the areas of carried interests, income tax accounting and state taxation.

In October 2011, Jason rejoined RSM in the financial services department. He is experienced in providing tax and consulting services to hedge funds, fund of funds and private equity funds as well as other seasoned areas such as Foreign Account Tax Compliance Act compliance.

Kevin Kao is a Manager in the RSM International Tax Services group. He has experience with RSM serving

primarily multinational technology, manufacturing, agribusiness, and professional service based companies. In addition to providing compliance services for multinationals, Kevin has collaborated with clients on various structural and operational matters relating to their foreign operations.

Jacob Booth provides tax consulting and compliance services to internationally active clients, with a focus on the technology and business services industries. He also specializes in helping clients with international tax aspects of financial accounting for income taxes.

In his current role, Jacob delivers advice and consultation regarding complex international tax matters, including tax structuring alternatives for an evolving global tax landscape. Jacob has over seven years of public accounting experience and is an active member of the communities he serves.

Walter Massie Memorial Scholarship Fund

The chapter scholarship utilizes the IMA MEF Scholarship application. The 2019 Scholarship application is now available on the IMA website. Apply [here](#).

Scholarship Eligibility

- A. To be eligible, applicants should be enrolled in a higher educational institution and should be:
1. Children of Dallas Fort Worth Chapter members enrolled in higher education institutions, or
 2. Members of student groups sponsored by the Dallas Fort Worth Chapter, or
 3. Student members of the Dallas Fort Worth Chapter,
 4. Regular members of the Dallas Area Chapter.

Apply for the Global Scholarship, make a copy, and easily apply for a 2nd scholarship.

DALLAS FORT WORTH CHAPTER MEETING

The Dallas Fort Worth Area IMA Chapter will meet Tuesday, February 19th 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 – Tax Reform: What is it good for? by Jason Lunte, CPA (Senior Manager, Tax Services, RSM US LLP)
- 6:20 PM Registration for Technical Session and Networking
- 6:45 PM Dinner
- 7:20 PM Announcements
- 7:30 PM Technical Session – International tax provisions of the Tax Cuts and Jobs Act – Where are we now? by Kevin Kao (Manager - International Tax Services at RSM US LLP) and Jacob Booth
- 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 to 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, February 15th

Cancellation, please e-mail reservations@dallasima.com as soon possible. Refunds will not be made for cancellations made after 12:00 noon on Friday, February 15th. 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

Call for Chapter Community Service Volunteers

If you missed volunteering for the Angel Tree project due to your busy holiday schedule, here is another opportunity to help people in need. The Dallas Fort Worth IMA Chapter will participate in the annual Richardson Area Interfaith Habitat (RAIH) walk-a-thon to raise money for Habitat for Humanity on Saturday, February 23, 2019.

Sign up on the Chapter website link and print a copy of the registration/donations form and collect donations before the walk. (You can also make a donation on the chapter website.) Then show up with your donations at the entrance to the **University of Texas at Dallas (UTD)** at Floyd Road and Lookout Drive in Richardson. (If you are using GPS, set it to **2592 N Floyd Rd., Richardson.**)

Registration is 8:30-9:30 am. Parking is available in the adjacent UTD parking lot. The Walk-a-Thon is 5 miles through the residential neighborhood east of UTD. There will be stations along the route stocked the bottled water, fruit, energy bars and a t-shirt at completion. Registration fee: 15/person and \$30/family.

Your participation achieves three goals:

1. Raises money for a very worthwhile purpose,
2. Helps the chapter meet its community service goal, and
3. Jump-start that New Year's resolution to get more exercise.

Additional information on page 7 or click [here](#) to make a donation or register for the event.



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 Jimie.Smith.HillsofLlano@gmail.com.

FREE CPE WEBINARS

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 Approved) Inside Talk, Leadership Academy, and Strategic Management Series Webinars. Register at <https://www.imanet.org/education-center/webinars?ssopc=1>

Inside Talk

Our highly popular series on timely, emerging issues and relevant topics such as technology, data analytics, revenue recognition, expense reporting and continuous accounting.

- ◇ February 13, 2019 (12 noon) **The Time is Now - Why Accounts Payable Needs an Automation** (1.0 CPE)
- ◇ February 20, 2019 (12 noon) **How High-Growth Companies Leverage Leading Practices to Reach Their Maximum Potential** (1.0 CPE)
- ◇ February 27, 2019 (12 noon) **Top 10 ERP Selection and Implementation Lessons Learned** (1.0 CPE)

Leadership Academy

Monthly webinar series that empowers entry- and intermediate-level management accountants to become leaders within the profession.

- ◇ February 05, 2019 (12 noon) **Mentoring - The IMA Way** (1.0 CPE)
- ◇ March 05, 2019 (noon) **Leading Change** (1.0 CPE)
- ◇ April 02, 2019 **Financial Leadership**
- ◇ May 07, 2019 **Facilitation Skills**
- ◇ June 06, 2019 **Cultivating a Bias-Free Workplace**

Strategic Management

A series of engaging webinars that focuses on various elements of strategy and competitive analysis that is of importance and interest to management accountants.

- No webinars in February

UTA Firm Night—2/22/2019

President's Message

Are you ready for 2019? With the new year comes a time to rest and reflect on the year that has just passed, and make goals for the future. Every year there are articles claiming that New Year's resolutions are a waste of time and energy, but I think they are great. I believe all of us should desire to meet new goals; to learn and grow and make a greater impact with their career and community. What are your goals? Would you like to learn more, be exposed to new ideas, and spend more time with a community of other accounting professionals? We would encourage you to start coming out to the IMA events. They are already on the schedule and ready for your RSVP.

Joe Baze

Dallas-Fort Worth IMA
Chapter President

Chapter Sponsor:



www.mamrecruiting.com

The UTA Accounting Society would like to invite you to our annual Firm Night. At this annual event for accounting students only, firms can get to know our accounting students in a formal, career fair setting.

This year's Firm Night will take place on February 22nd, 2019, from 6:30 PM to 8:30 PM in the Bluebonnet ballroom of the University Center. Each firm in attendance will have a designated table with room for up to five representatives, and firms can arrive from 5:30 PM to set up.

The participation fee for Firm Night is \$200*. If you have any questions or concerns, please don't hesitate to contact Terra McGhee at tcbrown@uta.edu or 817-917-2083.

You can sign up to join us here: <https://www.signupgenius.com/go/20FoB45A9AE2AA2FE3-firm>

*Please note: the participation fee is waived for governmental and nonprofit organizations. We hope to see you there!

Request for Nominations

The nominating committee will soon begin the process of putting together the team that will lead the Dallas Fort Worth Area Chapter for the 2019-2020 Chapter Year (June 1, 2019 – May 31, 2020). Being on the IMA Board is a great opportunity to develop, improve and sharpen leadership skills in a safe, low risk environment. Board members have the chance to serve the chapter and establish new relationships as well.

The nominating committee would like to challenge new members and members who have not served on the board to consider doing so for next year. Current board members are encouraged to continue their service to the chapter. If you are interested in serving on the Board, please let Lorna Winston-Blanks (lcwbanks@gmail.com) know of your interest or if you have any questions. She is the chairperson of the nominating committee.

If you know of a chapter member who you feel would be a potential candidate and has an interest in serving on the Board, please nominate them.

Dallas Fort Worth Area Chapter Members Serving at

Texas Council

- President – Nancy Hudnall
- Treasurer – Lorna Winston-Blanks

The Global Level

- Former Chair/Global Board – John Macaulay
- Planning and Development Committee – John Macaulay
- IMA Leadership Academy Committee - Daniel Smith
- Stuart Cameron McLeod Society (SCMS) Vice President – Pat Wynn
- Stuart Cameron McLeod Society (SCMS) Treasurer – MaryValerie Reeves
- Committee on Academic Relations (CAR) - Bruce W. Runyan
- Diversity and Inclusion Advisory Committee – Jimmie Smith

2018-19 Chapter Leadership Team

Board Members - Officers and Directors

President	Joe Baze
President Elect	
Vice President	Nikki Thirasant-Meyer
Secretary	Noel Kaiboni
Treasurer	Joe Lee
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
Director, Young Professionals	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	Joe Baze
Texas Council Delegate	Manasseh Sarpong
Chair, Long Range Planning Committee	Lorna Winston-Blanks

Team Members and Coordinators

Community Service Coordinator	Drew Mohr
Education Team	Mary Ann Markowitz
Employment Coordinator	Jimmie Smith
Networking Events Coordinator	Rory Guthrie
Webmaster	Stephanie Carpenter

Long Range Planning Committee

Chair, Long Range Planning Committee	Lorna Winston-Blanks
Member	Stephanie Carpenter
Member	MaryValerie Reeves
Member	Christina Romero
Member	Jimmie Smith
Member	Nikki Thirasant-Meyer

Texas Council

Corner

The Council is comprised of the five Texas IMA Chapters – Austin Area, Dallas Fort Worth Area, El Paso, Houston and San Antonio.

The next Texas Regional Council meeting will be April 27th at the Drury Inn & Suites Dallas Frisco, 2880 Dallas Parkway, Frisco, TX hosted by the Dallas Fort Worth Chapter.

2019 Seminar

Drury Inn & Suites Dallas Frisco, 2880 Dallas Parkway, Frisco TX

- * April 25th - IMA Texas Annual Conference (Pre-conference), – Power Excel by Bill Jelen, aka Mr. Excel (4 hours CPE)
- * April 26th – IMA Texas Annual Conference (8 hours CPE) (see [back page](#) for more info)

Annual Conference Sponsorship Opportunities

The IMA Texas Regional Council is hosting an all-day event, IMA Texas Annual Conference, at the Drury Inn & Suites Dallas Frisco, 2880 Dallas Parkway, Frisco April 26th, plus a half day pre-conference event on April 25th. Attendance is expected to be in the 70-100 range. It will be heavily promoted in the Dallas Fort Worth area, plus throughout the state of Texas. IMA has 1,000+ members in the Dallas Fort Worth Area and 2,600+ Texas members, with chapters in Austin, Dallas Fort Worth, El Paso, Houston, and San Antonio.

This event may provide a great sponsorship opportunity for your firm. Click [here](#) for more information.



100 Years and Counting: A History of the Institute of Management Accountants

The comprehensive history of the most influential association of management accountants

From 1919 to today, our members have accumulated a lot of stories, accomplished many milestones and watched the profession change dramatically. This book, authored by C.S. “Bud” Kulesza, CMA, CFM, 1999-2000 IMA Chair and John B. Pollara, CMA, 2007-2008 IMA Chair, details the most intriguing people, noteworthy achievements and dramatic occurrences of IMA’s 100 years.

For more information go to <https://ima100years.org/>

Richardson Area Interfaith Habitat

Richardson Area Interfaith Habitat (RAIH) is a local area outreach program designed to improve the quality of life for deserving, caring, sharing, and committed families and to involve area churches and synagogues in that process as an **interfaith ministry**.

Richardson Area Interfaith Habitat has supported Dallas Habitat for Humanity since 1991 in building new homes or restoring existing homes for individual families with job stability and a desire to own their own home. We plan to build our 40th and 41st homes in 2019.

RAIH raises money for building houses through activities such as this Walk-a-Thon, other fundraisers, and from donations from our congregations and business organizations. We then recruit congregation volunteers who spend 10 Saturdays building a house, which is then presented to the recipient at a dedication celebration at the end of the build.

The families who receive these homes are proud to achieve their dream of home ownership and, in return, pass this sense of pride on to others in their community.

We thank all of you for contributing to this worthwhile cause.

Your Representatives are:

Ed Murray 972-301-2794
Mike Proch 214-415-0063

Dallas Area Habitat for Humanity

Dallas Area Habitat for Humanity (DAHfH), a local affiliate for Habitat for Humanity International, was founded in 1985. DAHfH seeks to provide a long-term, permanent solution to the need for decent affordable homes for low-income families. Through donated supplies and volunteer efforts, Dallas Area Habitat coordinates the construction of new homes in neighborhood groups, and the rehabilitation of existing homes.

With the many volunteers donating both time and materials, DAHfH homes can quickly be built for the equivalent of half the market value. When homes are completed, DAHfH sells them to low-income families at cost with 0% interest. Potential homeowners must provide 200 hours of 'sweat equity' either on their own home or other Habitat projects in lieu of a down-payment.

Dallas Area Habitat receives technical assistance from the international office but must raise its own construction and operating funds for programs. DAHfH provides family nurturing and education through tutoring and family resource programs. It also encourages development of Neighborhood Associations to help build a strong neighborhood base.



24th Annual Walk-a-Thon for "Habitat for Humanity"

**Saturday
February 23, 2019**

**Backup date
March 2, 2019**

Location: UTD Parking Lot -
at corner of Floyd Road and
Lookout Drive in Richardson.

Registration: 8:30-9:00 a.m.
Enjoy snacks and visiting until start!

Walk-a-Thon begins at 9 am

Registration: \$15/ person, \$30/ family
Will be offset \$5 for every \$100 pledged.
All participants will receive a free RAIH
T-Shirt with registration.

Pledge Form

Your Name: _____
Address: _____
City: _____
State, Zip: _____
Phone: _____
Congregation: _____

(Please Print)

Sponsor's Name Phone # \$ Pledged

Example:

Joe Smith 972-xxx-xxxx \$25.00

1 _____ \$

2 _____ \$

3 _____ \$

4 _____ \$

5 _____ \$

6 _____ \$

7 _____ \$

8 _____ \$

9 _____ \$

10 _____ \$

11 _____ \$

12 _____ \$

13 _____ \$

14 _____ \$

15 _____ \$

16 _____ \$

17 _____ \$

18 _____ \$

19 _____ \$

20 _____ \$

TOTAL COLLECTED: \$

If more lines are needed, just use another pledge form. ©

**Let's make this year's Walk-a-Thon
fun for the whole family.
Children are encouraged to walk also.**

Distance is 5 miles or 8 kilometers

8:30 -9:00 am START:

**Registration
and collection of Pledges**

**Fee: \$15/ person, \$30/ family
This fee will be offset by \$5 for every
\$100 in pledges turned in at the start.**

9:00 am: THE WALK BEGINS!

Route starts at the corner of Floyd Road and Lookout Drive. As you walk East on Lookout you will pass Canyon Creek Country Club. Continue on to Prairie Creek, turn left and go to Collins, turn left here and go to Renner Road. Continue West on Renner to Custer Pkwy. where you will turn South to Lookout. When you reach Lookout, turn to your right and take Lookout back to Floyd and the beginning.

**Snacks, water, coffee and
soft drinks will be provided
before, during and after the Walk.**

1. Get Sponsors to pledge!

Get your friends, business associates, neighbors, relatives, co-workers, and/or church members to sponsor you for this important event. Ask your company or other companies if they will match your pledge amount.

If you need additional pledge forms ask your congregation representative or call (972) 235-0742.

2. Collect Your Pledges

Any pledges or donations collected in advance of the walk can be turned in at Registration time at the Walk-a-Thon.

Checks should be made payable to: **'Dallas Area Habitat for Humanity'** with **'Richardson Area Interfaith'** noted on the memo line.

Any pledges collected after completing the walk can be given to your congregational representative listed on back or mailed to:

**Walk-a-Thon
c/o Bill Boyer
13405 Spring Grove
Dallas, Texas 75240**

3. Register and Walk

Registration begins at 8:30 am, February 23, 2019 at corner of Floyd Rd. and Lookout Dr., in Richardson.

Parking in the UTD parking lot.

IMA'S VISION

To be the leading resource for developing, certifying, connecting, and supporting the world's best accountants and financial professionals in business. IMA does this by:

- ◆ Offering the prestigious credential—the CMA®—with a proven return on investment
- ◆ Building a professional network that provides career resources and contacts that last a lifetime
- ◆ Giving voice to the profession with insightful and timely journals and newsletters
- ◆ Serving as a thought leader in cutting-edge research and industry best practices
- ◆ Advocating for the profession in a challenging regulatory environment

WELCOME TO OUR CHAPTER

Welcome New Members

- Matthew Cole Cecil, Student
- Gary Gadson
- Ciara Nicole Gray, Student
- Yousef Hamad
- Jessica Hofer
- Alket Koci
- Christopher Munoz
- Joe O'Brien
- Taylor O'Bryan

- Jessica Pelton
- Joseph Rutens
- Jacqueline Walser
- Sureena Weir

Welcome Transfers from Other Chapters

- Nickole M Corella, Student
- Nikhil Vilas Deshpande

Full Day Conference (4/26)

- Digital Controllershship Trends by Ashley Gibson, CMA, CPA (Manager, Deloitte Advisory, IMA Global Board of Directors)
- Digital Age: Data Analytics by Dennis Whitney, CMA (Senior Vice President, Certifications, Exams, & Content Integration; Institute of Management Accountants)
- Cybersecurity & Data Privacy – Understanding the Risk and Tips for Mitigation by Jeremy Price, CISA, MSCE (Senior Manager and Practice Lead, Stinnett & Associates Cybersecurity Consulting & Advisory Services)
- Practical Ethics by Danny Goldberg, CPA, CIA, CISA, CRISC, CRMA, CGMA (Partner, GoldSRD)
- Service - A Key to Leadership by Bud Kulesza, CMA (CFO, Retired, ITT Automotive, former IMA Global Chair)

Registration is now open



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PO Box 612084
Dallas, Texas 75261

<http://dfw.imanet.org>
@IMA_DFW

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