



The Association of  
Accountants and  
Financial Professionals  
in Business

March 2019

DALLAS FORT WORTH AREA CHAPTER

## THE F.A.N.

### FINANCE & ACCOUNTING NEWS YOU CAN USE

#### CHAPTER DINNER MEETING

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



Where: DoubleTree by Hilton Dallas Near the Galleria

Professional Development Session: **#Us Too: Common Ground on Gender Bias** by Debjani Biswas, Founder and CEO, Coachieve LLC and bestselling author

Objectives:

- ◆ Recognize unconscious and widely prevalent gender biases using self-awareness and emotional intelligence.
- ◆ Identify key sources of deep-rooted gender norms, values, and beliefs.
- ◆ Take specific actions to boldly shatter tired gender stereotypes, thus helping bridge the global gap

**Field of Study:** Other

**Prerequisites:** None

Technical Session: **Insurance Trends that you need to know that will impact Finance** by Steve McElhiney, CPCU, CEO, EWI Re, Inc.

Objective:

- ◆ Identify current insurance industry trends and impact on Finance

**Field of Study:** Other

**Prerequisites:** None



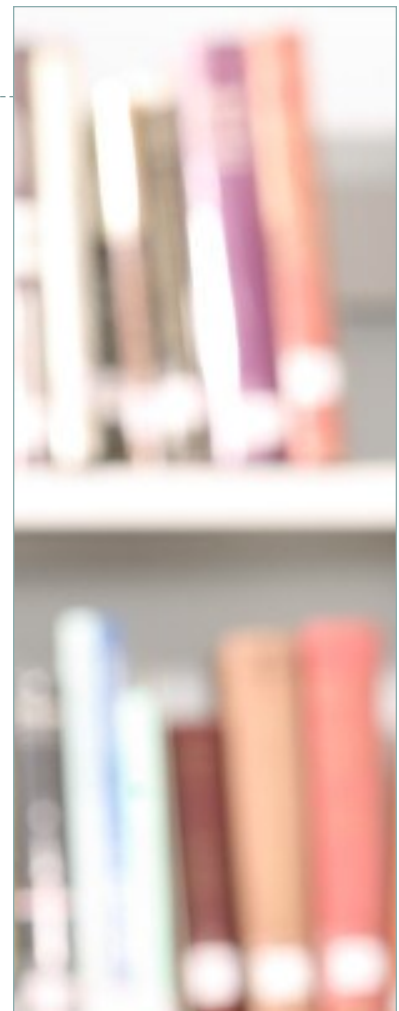
For more information and to register click [here](#).

### Dallas Fort Worth Area IMA Networking Happy Hour

Join us on Thursday, February 28th and March 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 events start 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 28 – NetWorking Lazy Dog Restaurant, 5100 Belt Line Road Addison
- March 19—Chapter Dinner Meeting DoubleTree Near the Galleria
- March 28 – NetWorking Lazy Dog Restaurant, 5100 Belt Line Road Addison
- April 16—Chapter Dinner Meeting DoubleTree Near the Galleria



DEADLINE for Global Scholarship is MARCH 10

### 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 (at the chapter level).

## MARCH CHAPTER SPEAKERS

Power Leader and NAPW 'Woman of the Year' **Debjani Biswas** applies her unique background of engineering, diversity and strategy to ask: "What is the business impact of inclusion at work?" With 20 years corporate experience, Biswas is currently President of Coachieve, LLC, which specializes in leadership and diversity solutions. Biswas is the internationally bestselling author of Miserably Successful No More' <http://amzn.to/2puP3sH> and 'Unleash the Power of Diversity' <http://amzn.to/16oFcZz>, "A Power Paradox: Gender Matters" is forthcoming. She is the trusted advisor and executive coach of CEOs and senior leaders, leveraging multiple culture, leadership and organizational effectiveness assessment tools. Biswas holds an undergraduate degree in Chemical Engineering, an MBA in Marketing and an MS in Organizational Strategy and International Management. She serves on the board of her engineering alumni organization IIT-NT, is an active volunteer, and partners with the National Alliance for Partnerships in Equity on STEM solutions.

**Steve McElhiney** serves as the Chief Risk Officer for the parent company,

Contran Corporation as well as the President of their Captive insurance company, Tall Pines Insurance Company of Vermont and EWI Re (UK), Ltd., EWI's London based subsidiary and Lloyd's brokerage.

Steve's insurance industry experience spans over two decades with several global insurance groups. He has served in the roles of CFO, Corporate Treasurer, Reinsurance division executive, and Board member.

This year, Steve was elected to be the Vice-Chair of the Board of Captive Insurance Companies Association ("CICA"), the global association for captive insurance companies. He is a Past President and Chairman of the International CPCU Society (2011-2012), and a Past Chairman of the Board of the Vermont Captive Insurance Association (2011-2013).

Steve has an MBA in Corporate Finance and a Bachelor of Science, *cum laude*, from the University of Southern California. Steve has been interviewed and quoted in a variety of insurance publications and is a frequent panelist at Reinsurance, Capital Markets, CPCU, Captive, and Risk Management industry events.

## DALLAS FORT WORTH CHAPTER MEETING

The Dallas Fort Worth Area IMA Chapter will meet Tuesday, March 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 – #Us Too: Common Ground on Gender Bias by [Debjani Biswas](#) (Founder and CEO, [Coachieve LLC](#) and bestselling author)
- 6:20 PM Registration for Technical Session and Networking
- 6:45 PM Dinner
- 7:20 PM Announcements
- 7:30 PM Technical Session – Insurance Trends that you need to know that will impact Finance by [Steve McElhiney](#), CPCU (CEO, EWI Re, Inc.)
- 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, March 15th

**Cancellation**, please e-mail [reservations@dallasima.com](mailto:reservations@dallasima.com) as soon as possible.

Refunds will not be made for cancellations made after 12:00 noon on Friday, March 15<sup>th</sup>. 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](mailto:reservations@dallasima.com)

## Meet Your Chapter Treasurer

### Biography of Joe Lee

Joe Lee was born in Taiwan, and he moved to Dallas, Texas when he was 9 years old. He's graduated from the University of Texas at Dallas with a Bachelors and a Masters in Accounting. He became a CPA in 2015 and a CMA in 2018.

Joe started his career in public accounting at a local tax firm. After he's moved to industry accounting at a golf course managing company, he then co-founded a company that hosts 5K and 10K runs at night, where runners all wear glimmering LED lights and brightens the night like fireflies. Now he is currently an Accounting Manager at Ashford Hospitality Trust, which is a Real Estate Investment Trust (REIT) focused on investing opportunistically in the hospitality industry in upper upscale and full service hotels, and he has been with the company for about 5 years now.



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](mailto: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.

- ◇ March 11, 2019 (12 noon) **Data Analytics—Exposing the Organization to Finance's Value** (1.5 CPE)

#### Leadership Academy

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

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

#### 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.

## Upcoming Events

- April 16th Dinner Meeting (5:30 - 8:30 PM), Hilton Dallas Near the Galleria, 4099 Valley View Lane, Dallas - “Stress Management with Ease” and “7 forms of waste in organizations – Money is lying on the floor of your business”
- April 25th VIP Tour of The Dallas Cowboys World Corporate Headquarters at The Star in Frisco
- April 25th Networking Happy Hour (5:30 - 8:00 PM), Blue Mesa Grill 8200 Dallas Pkwy, Plano
- April 25th IMA Texas Annual Conference -Pre-conference (4 CPEs), Drury Inn & Suites, 2880 Dallas Parkway, Frisco – Power Excel by Bill Jelen, aka Mr. Excel
- April 26th IMA Texas Annual Conference (8 CPEs), Drury Inn & Suites, 2880 Dallas Parkway, Frisco

Chapter Sponsor:



[www.mamrecruiting.com](http://www.mamrecruiting.com)

## Request for Nominations

The nominating committee is in 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](mailto: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.

In addition, the committee will be contacting members to ask him/her to serve in the coming year. The Board meets monthly via lunch time conference calls and two face to face meetings after dinner meetings for the months September through April. Monthly planning sessions for the new term occur May through August.

### Congratulations to our New CMAs

Yanhong Huang

## 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 27<sup>th</sup> 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 25<sup>th</sup> - IMA Texas Annual Conference (Pre-conference), – Power Excel by Bill Jelen, aka Mr. Excel (4 hours CPE)
- \* April 26<sup>th</sup> – 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 26<sup>th</sup>, plus a half day pre-conference event on April 25<sup>th</sup>. 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 infor-



## **Celebrate "100 Years and Counting"**

IMA's Annual Conference & Expo (ACE2019) is coming to beautiful San Diego to celebrate our 100<sup>th</sup> Anniversary.

We're excited for you to be a part of this milestone Conference, which features an epic party in honor of our centennial, fun networking events like the IMA Membership Mingle, and spectacular keynote speakers headlined by the one and only Jay Leno!



ACE2019 provides a convenient way to earn CPE you need.

[Click here to view the full session agenda.](#)

### **Register now and save!**

Take advantage of the Early Bird rate of just \$1,300 for IMA members – a savings of \$350!

**REGISTER NOW**

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



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**Application Form**

Name: \_\_\_\_\_  
 Mailing Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State \_\_\_\_\_ Zip: \_\_\_\_\_  
 School Phone: \_\_\_\_\_ Home Phone: \_\_\_\_\_  
 Email: \_\_\_\_\_  
**IMA Membership Number:** \_\_\_\_\_  
 School: \_\_\_\_\_

Scholarship Type (Check One):  
 Undergraduate Student \_\_\_\_\_ Graduate Student \_\_\_\_\_

Current Status (Check Appropriate): Full Time \_\_\_\_\_ Part Time \_\_\_\_\_ Number of Credits \_\_\_\_\_  
 Major Field of Study: \_\_\_\_\_ Expected Date of Graduation: \_\_\_\_\_

Overall GPA (Grade Point Average): \_\_\_\_\_ Major Course Work GPA: \_\_\_\_\_ (i.e., 3.5/4.0)

Applicant's signature acknowledges he/she has read the instructions and requirements for the scholarship program and the *IMA Statement of Ethical Professional Practice*. The *IMA Statement* can be read [here](#).

Applicant's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**IMA Memorial Education Fund (MEF) Scholarship Recommendation Form – Two Recommendations Needed**

Applicant's Name: \_\_\_\_\_

1. How long and under what circumstances have you known the applicant?  
 \_\_\_\_\_  
 \_\_\_\_\_
2. How would you rate your experience with the applicant when compared to those of his/her peers in similar circumstances?  
 \_\_\_\_\_  
 \_\_\_\_\_
3. Please comment on the applicant's personal integrity. \_\_\_\_\_  
 \_\_\_\_\_
4. Please comment on the applicant's leadership skills, including problem solving, managing conflict, innovation, and peer mentoring. \_\_\_\_\_  
 \_\_\_\_\_
5. Please comment on the applicant's principal strengths. \_\_\_\_\_  
 \_\_\_\_\_
6. Please comment on the applicant's principal development needs. \_\_\_\_\_  
 \_\_\_\_\_
7. Please provide any additional comments that can help IMA evaluate the applicant's candidacy for a national scholarship and accompanying recognition. \_\_\_\_\_  
 \_\_\_\_\_

Evaluator's Signature: \_\_\_\_\_  
 Name (Please Print or Type): \_\_\_\_\_  
 Position/Title: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

## IMA GLOBAL CORE VALUES

- ◇ Respect for the Individual
- ◇ Passion for Serving Members
- ◇ Highest Standards of Integrity and Trust
- ◇ Innovation and Continuous Improvement
- ◇ Teaming to Achieve

## WELCOME TO OUR CHAPTER

### Welcome New Members

- Brandon Bales
- Megan D. Christopher
- Michelle Conner
- Tyler Tristin Costlow, Student
- Clay Heston, Student
- Cade Hutchison, Student
- Sharon Jameson
- Sugunasai Janarathanan
- Jessica Johnson Kalin
- Kenneth Lee Klump, Student
- Leonard Marrufo, Student
- Melisa Martinez
- Cassandra A Taylor
- Martha S Walker

### Welcome Transfers from Other Chapters

- Wouter Claasen
- Jared A. Eutsler
- Nicholas D. Geer
- Janet McDonald Huston
- Jagruti Joshi, Student
- Dorothy A. Marotta
- Richard Charles Mueller, Student
- Susan Paddack
- Donald A. Petras
- Krishnan Ramadas
- Mandie Marie Rock
- William Rowland, Student
- Ahmad Al Samman
- David A. Stern
- Lesley E Swain

### 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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