

September 2019



The Association of Accountants and Financial Professionals in Business

DALLAS FORT WORTH AREA CHAPTER

THE F.A.N.

FINANCE & ACCOUNTING NEWS YOU CAN USE

CHAPTER DINNER MEETING

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

Where: DoubleTree by Hilton Dallas Near the Galleria

Blockchain Explained / Philip Diekhoff, CISSP, CISA, Managing Consultant, BKD Cyber, BKD, LLP



Objectives:

- * What is blockchain
- * How does blockchain work

Field of Study: Information Technology

Prerequisites: None

State and Local Tax Update /Dallas Packer, CPA,

Director of State and Local Tax, Whitney Penn and Josh Graham, CPA, Tax Manager, Whitney Penn



Objectives:

- * Stay current on Economic Nexus—Wayfair Update
- * Learn current Issues and Trends in State and Local Taxes
- * Get updated on recent Court Cases and Decisions on Texas Franchise and Sales and Use Tax

Field of Study: Tax **Prerequisites:** None

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

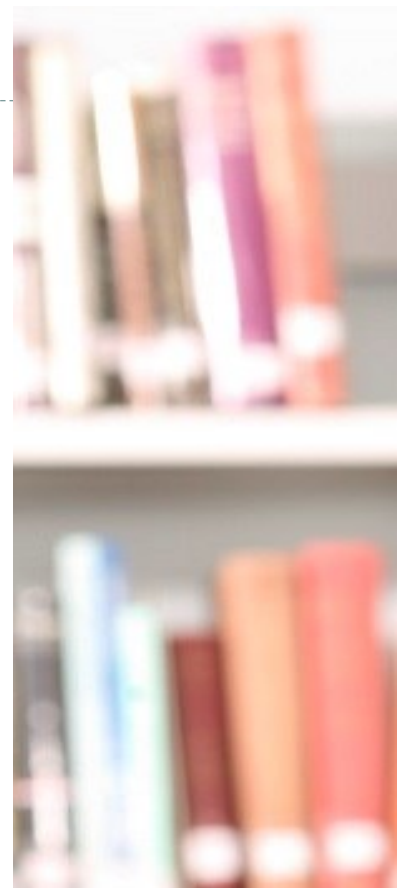
Dallas Fort Worth Area IMA Networking Happy Hour

The next Networking Happy Hour will be September 26th at Lazy Dog Restaurant & Bar, 5100 Belt Line Rd #500, Dallas. For more information or to register [click here](#).

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.

We look forward to seeing you there!



INSIDE THIS ISSUE

President's Message.....	2
Meeting Schedule	3
Congratulations to new CMAs.....	4
September Speakers' bios.....	4
Walter Massie Scholarship Fund	4
DFW Student Extravaganza	5
Free CPE Webinars.....	5
Business Planning & Analytics (4 CPE hours).....	6
Are you an Influencer?	7
New Chapter Members	7
Members Serving at Regional/Global.....	7
Upcoming Events	8
Chapter Sponsor.....	8
Gleim CMA Review.....	8
Chapter Officers.....	9
Texas Council Corner	10
DFW Student Extravaganza Sponsorship.....	10
IMA Podcast	11
Student Ambassador Program	11
Women's Accounting Leadership Series.....	11

CHAPTER DATES TO REMEMBER

- September 19—Chapter Dinner Meeting
DoubleTree Dallas Near the Galleria
- September 26—Networking Happy Hour
Lazy Dog Restaurant & Bar , Dallas
- September 27—DFW Student Extravaganza
Texas Wesleyan University, Fort Worth
- October 17—Chapter Meeting –12: - 4:30 PM Business Planning and Analytics
DoubleTree Dallas Near the Galleria
- October 24—Networking Happy Hour
Lazy Dog Restaurant & Bar , Dallas
- November 21—Chapter Dinner Meeting
DoubleTree Dallas Near the Galleria

A Message from our
Chapter President



Dear Fellow IMA Members & Guests,

Welcome to the Dallas Fort Worth Area Chapter IMA. The year has gotten off to a great start. I would like to personally thank our education team for coming up with the awesome topics that we have outlined for the year. Without our volunteers, we wouldn't be able to offer high quality programs to our members. Our first dinner meeting was evident by the positive evaluations we received. You missed a winner - "US and Texas Economic Outlook" and "Preparing for Robotic Process Automation: What you need to know". This year our meetings will be geared more towards technical topics that pertain to our businesses. If you would like to learn more about what's going on in the accounting world and want to get continuing education good for both CMAs and CPAs, check out a meeting. You won't regret it. For a complete listing of events and happenings, check out our website, dfw.imanet.org.

Here's a little snapshot for what we have going on in September:

- 9/19/19 – Dinner meeting – Blockchain follow by a US & Local Tax Update
- 9/26/19 – Happy Hour – at the Lazy Dog
- 9/27/19 – Student Extravaganza – Sponsors and volunteers are welcome. For more information, please contact Jimmie Smith.

As a Dallas Fort Worth member, we would like to hear from you. While we have a lot of the year planned, there is always room for more. If you have a topic request for a dinner meeting or one of our mini conferences coming up, please don't hesitate to reach out to one of the board members. We as a group want to make the IMA what YOU as members want to see. My goal for the year was to see more technical topics. However, there are so many worthy topics that the list is long. What do you want? What will get YOU as a member to attend a meeting? How can we make your IMA more beneficial to YOU?

I look forward to seeing YOU at an upcoming event. Continue to help me make this a great year. I encourage all of our members to attend at least one function if not all. I would love to meet **YOU**. See you soon.

Sincerely,

Nikki Thirasant-Meyer
Chapter President 2019 - 2020

SEPTEMBER DALLAS FORT WORTH CHAPTER MEETING

The Dallas Fort Worth Area IMA Chapter will meet **Thursday, September 19th** at the DoubleTree by Hilton Dallas Near the Galleria, 4099 Valley View Lane, Dallas

- 5:15 PM Registration
- 5:30 PM Blockchain Explained by Philip Diekhoff, CISSP, CISA, Managing Consultant, BKD Cyber, BKD, LLP
- 6:20 PM Registration and Networking
- 6:45 PM Dinner
- 7:20 PM Announcements
- 7:30 PM State and Local Tax Update by Dallas Packer, CPA, Director of State and Local Tax, Whitney Penn and Josh Graham, CPA, Tax Manager, Whitney Penn
- 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, Monday, September 16th**

Please register on our [website](#)

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

Apply to serve on [IMA's Global Board of Directors](#) (deadline: September 6).



The Association of
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SEPTEMBER CHAPTER SPEAKERS



Congratulations to our Scholarship Winner

Sanjari Chelawat

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).

Phil Diekhoff is a member of BKD's IT Risk Services division and has 15 years of experience in information technology (IT) security. His focus is on Federal Financial Institutions Examination Council-based cybersecurity and IT controls assessments, internal and external penetration testing, vulnerability scanning and social engineering testing for financial institutions. Phil also performs model validations for BSA/AML and other systems for financial institutions.

Prior to joining BKD, Phil worked as a network engineer. He also served as the IT security analyst in BKD's National Office and was responsible for network scanning and monitoring, IT risk assessments and firm wide IT security training. Currently, Phil is a member of BKD's Blockchain Committee. The Blockchain Committee goal is to actively monitor the blockchain space and provide guidance to BKD employees and clients.

Phil is a Certified Information Systems Security Professional (CISSP®). He is a member of ISACA® and has earned a Certified Information Systems Auditor (CISA) designation. He has represented the firm at various IT conferences. He is a graduate of Concordia University, St. Paul, Minnesota.

Dallas Packer has over 25 years of tax experience in Federal, State, and International Tax matters in Public and Corporate Accounting. Dallas has extensive experience with corporate reorganizations, resolution of tax controversies at both the federal, state, and local levels, transactional planning, due diligence, mergers, acquisitions, and dispositions of

business. Dallas has substantial experience in Income and Franchise Taxes, Sales and Use Taxes, Personal Property Taxes, and Business Incentives at the Federal, State and Local Level. He has extensive experience in manufacturing, retail, technology, transportation, energy, construction, financial institutions, and Insurance industries. He developed deep relationships with nationally known tax litigators across the United States and has successfully taken and defended aggressive tax positions one of which that ultimately resulted in a landmark taxpayer victory at the U.S. Supreme Court (MeadWestvaco Corp. v. Illinois Department of Revenue).

Dallas earned his BS in Accounting from The University of Dayton. He is a member of Texas Society of Certified Public Accountants (TSCPA) and the American Institute of Certified Public Accountants (AICPA).

Josh Graham is a Certified Public Accountant with more than 10 years of sales and use tax experience and two years in multi-state income/franchise tax working with clients in a variety of industries including: real estate, oil & gas, financial institutions, retail, insurance, telecommunications, and manufacturing. He received a B.B.A. in Accounting from Texas State University – San Marcos and an MBA in Management from University of Mary Hardin Baylor.

Josh is a member of the American Institute of Certified Public Accountants (AICPA) and is currently active in Toastmasters International.

Congratulations New CMAs

Mr. Dhruvesh Photawala, CMA

Mr. Jason Robert Short, CMA

Dallas Fort Worth Area Chapter Student Extravaganza

September 27, 2019, Presented by [Dallas Fort Worth Area IMA](#)

Location: Texas Wesleyan University

Nick and Lou Martin University Center | 1201 Wesleyan St, Fort Worth 76105

Schedule: 8:45 AM to 4:30 PM

What to Expect

This one-day event provides you a unique opportunity to participate in a wide range of exceptional sessions packed with the information you need to jump start your career and grow professionally. Expect to be challenged. Expect to be motivated. Expect to leave the event with new knowledge and new ideas. You will also get to spend invaluable time with peers, educators, employers, and accounting/finance professionals. It's a great way to "Power Your Future!"

Who Should Attend

Dallas Fort Worth Area Accounting and Finance Students (undergraduate and graduate), particularly those considering or wanting to learn more about a career in Management Accounting

Highlights

Valuable presentations that will help the students prepare to start their careers

- Insights to Corporate Management Accounting Opportunities by Julie Knecht (Vice President, Worldwide Accounting, Texas Instruments Incorporated)
- LinkedIn by Terry Sullivan (founder and CEO of BuzzPro)
- IMA Student and Academic Resources by Jimmie Smith, CPA (IMA Diversity and Inclusion Advisory Committee, former Global Board Member)
- Digital Controllershship Trends by Ashley Gibson, CMA, CPA (Manager, Deloitte Advisory, IMA Global Board Member)
- Future-Proofing Your Career with RPA by Loreal Jiles (Technology Demand Manager in BP's Upstream Accounting Reporting and Control organization, IMA Global Board Member)

Career Fair:

- The opportunity to meet representatives of a number DFW employers, learn about their industry and their career/internship opportunities
- Expert guidance on how to improve your resume
- Network with DFW accounting and finance professionals, as well as students in other regional universities

Drawings for CMA Review Materials, IMA Student Memberships, and more

Cost

Early Bird Pricing: \$20 register and pay by 9/10

Normal: \$25 9/11 – 9/20

Late: \$30 after 9/20 deadline or at door

Register Today!

For more information or to register

<http://dfw.imanet.org/events/recentcommunityeventsdashboard>

Special thanks to Texas Wesleyan University for hosting this event

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 IMAnet.org

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.

- ◇ September 09, 2019 (12 noon)
Tech Trek - A Journey Through the Latest Tech Trends (1.5 CPE)
- ◇ September 18, 2019 (12 noon)
Connected Business - The Key to Digital Transformation (1.0 CPE)
- ◇ September 23, 2019 (12 noon)
Data Strategies to Drive Business Strategy (1.0 CPE)
- ◇ October 01, 2019 (12 noon)
From accounting-speak to plain English: Practical tips (1.0 CPE)
- ◇ October 08, 2019 (12 noon)
The Productivity Imperative: Optimizing the Business in all Economic Conditions (1.0 CPE)

Leadership Academy

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

- ◇ September 03, 2019 (12 noon)
Creating a Compassionate Culture for a Lasting Competitive Advantage (1.5 CPE)
- ◇ October 08, 2019 (12 noon)
Personal and Professional Life Balance (1.5 CPE)
- ◇ November 05, 2019 (12 noon)
Time Management
- ◇ December 03, 2019 (12 noon)
Male/Female Communication: Building Collaborative Relationships

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.

**Please mark your calendar for our October Meeting!
Different Time and More CPE**

Business Planning and Analytics

Program Schedule:

12:00 PM	Registration/Lunch/Announcements
12:45 PM	Budgeting and Forecasting by Steve Player, Managing Partner, The Player Group
01:35 PM	Break
01:45 PM	Data Analytics
02:35 PM	Break (with refreshments)
02:45 PM	M&A Operational Overview by Adrien Dubourg, CMA, CPA, Operational Transaction Services - Manager, EY
03:35 PM	Break
03:40 PM	Panel Discussion by Steve Player, Managing Partner, The Player Group, Adrien Dubourg, CMA, CPA, Operational Transaction Services - Manager, EY
04:30 PM	Adjournment

Four (4) 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, October 11th**

Cancellation, please e-mail reservations@dallasima.com as soon as possible. **Refunds will not be made for cancellations made after 12:00 noon on Friday, October 11th.** 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.

[Register Here](#)

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 sfmagazine.com.

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](#).

WELCOME TO OUR CHAPTER

Welcome New IMA Members

- Dr. Jivas Chakravarthy, Academic
- Candace N Ford
- Alvin Gomez
- Charrie Lively
- Nhung Martir
- Mr. Corwyn Earl Mitchell
- Mr. Payton Dakota Moreland
- Holly Pinto
- Mr. Dennis Reese
- Mrs. Tasha Ricard
- Mr. Timothy Savage

Welcome Transfers from Other Chapters

- Mr. Bryan Daniel Granhold
- Mr. Anthony D. Smith, CMA, CPA

Dallas Fort Worth Area Chapter Members Serving at

Texas Council

- Treasurer – Laurie Burney

The Global Level

- Global Board of Directors—Pay Wynn
- Former Chair/Global Board – John Macaulay
- Planning and Development Committee – John Macaulay
- Member Relations Committee—Pat Wynn
- Leadership Academy Member - Pat Wynn
- Stuart Cameron McLeod Society (SCMS) President – Pat Wynn
- SCMS Vice President – MaryValerie Reeves
- Diversity and Inclusion Advisory Committee – Jimmie Smith

Upcoming IMA Events

- September 19—Dinner Meeting (5:30 - 8:30 PM) - Blockchain Explained-Philip Diekhoff, CISSP, CISA , Managing Consultant, BKD Cyber, BKD, LLP; State and Local Tax Update-Dallas Packer, CPA, Director of State and Local Tax, Whitney Penn & Josh Graham, CPA, Tax Manager, Whitney Penn
- September 26—Networking Happy Hour Lazy Dog Restaurant & Bar 5100 Belt Line Rd #500, Dallas
- September 27—DFW Student Extravaganza, Texas Wesleyan University, Fort Worth
- October 17—4 hour Seminar/Meeting Business Planning and Analytics (12:00 noon – 4:30 PM) Budgeting & Forecasting-Steve Player, Managing Partner, The Player Group; Data Analytics; M&A Operational Overview-Adrien Dubourg, CMA, CPA, Operational Transaction Services - Manager, EY
- October 24—Networking Happy Hour (5:30 - 8:00 PM), Lazy Dog Restaurant & Bar, 5100 Belt Line Rd #500, Dallas

Gleim CMA Review

As a proud IMA Strategic Partner and the review candidates have trusted since 1981, Gleim CMA is offering IMA Chapter members 25% off the Gleim Premium CMA Review.

Gleim CMA's mission is to help candidates pass their exams with confidence on the first try. We achieve this goal by working with the IMA to support candidates and provide everything future CMAs need to pass including:

- Realistic, exam-quality practice questions
- Expert and educator-led videos
- Comprehensive coverage of the ICMA's Content Specification Outlines
- Our Proven, stress-free study method
- Personalized and reliable candidate support
- And much more!

If you have questions or concerns about this offer, contact Alexandra Graham, alexandra.graham@gleim.com, 1-800-874-5346 ext 428.

Orders can also be placed online at Gleim.com/IMAChapter or by using your chapters custom ordering link.

Thank you to our Chapter Sponsor



www.mamrecruiting.com

2019-20 Chapter Leadership Team

Board Members - Officers and Directors

President	Nikki Thirasant-Meyer
Secretary	Noel Kaiboni
Treasurer	Joe Lee
Administration Team Lead	Joe Baze
Director, Meeting Arrangements	Elisabetta Mroski
Director, Member Attendance	Chris Boike
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, CPA CPE Compliance	MaryValerie Reeves
Membership & Marketing Team Lead	Martha Gibson
Director, Corporate Development	Jimmie Smith
Texas Council Delegate	Joe Baze
Texas Council Delegate	Nicole Thirasant-Meyer

Team Members and Coordinators

Community Service Coordinator	NingNing Mei
Education	Mary Ann Markowitz
Employment Coordinator	Lorna Winston-Blanks
Networking Events Coordinator	Rory Guthrie
Networking Events Coordinator	Athena Trentin
Webmaster	Stephanie Carpenter
Director	James Chamberlain

Long Range Planning Committee

Chair, Long Range Planning Committee	Joe Baze
Member	Stephanie Carpenter
Member	MaryValerie Reeves
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 October 26th.

For more information, go to texascouncil.imanet.org

DFW Student Extravaganza – Employer Sponsors Needed

Take advantage of a great opportunity to connect with top accounting and finance students from many of the DFW universities, as well as other colleges in the surrounding areas, including some that may not be included in your normal recruiting program.

The Dallas Fort Worth Area IMA Chapter will host its 6th DFW Student Extravaganza for accounting and finance students on September 27th at Texas Wesleyan University, 1201 Wesleyan St, Fort Worth, Texas. We are expecting 70-100+ students. From 12:00 to 2:15, students will visit employer/sponsor booths in addition to networking, having their resumes reviewed, and eating lunch. Sponsors can share information on their products and services. Employers will have the opportunity to meet the students, share information about their company and industry, and help them prepare to enter the job market. If the company is in the market for new graduates or interns, it will also provide an opportunity to collect resumes, set up interviews, etc. In addition, you are welcome to participate in as much of the rest of the event as you wish.

Please consider hosting one of the booths - \$200. Registration is currently available at form.jotform

Please consider hosting one of the booths - \$200.

Registration is currently available at <http://form.jotform.com/91466597644169>.



Help IMA advance the Student Ambassador Program

How can you further help IMA increase its awareness on campuses across the US? Have an IMA Student Ambassador serve on your chapter's board! IMA Student Ambassadors are the go-to experts on the IMA and CMA for their peers and schools. By serving on the board, ambassadors will gain the leadership and networking experience needed to successfully execute their mission of educating their peers on all things IMA, CMA, and your chapter.

For more information please email campus@imanet.org.

Check out IMA's Podcast

In July, IMA launched its podcast series "Count Me In," which will feature the latest perspectives on accounting and finance from industry experts with topics including emerging technologies, business innovation, and the future of the profession. Nine episodes have already been published and the subscriber list is rapidly growing! You can read more about the podcast in our press release [here](#) and to listen to the episodes, visit the podcast website [here](#).

Get Inspired at Our Upcoming Women's Leadership Events in Chicago

Registration is now open for the [Women's Accounting Leadership Series](#), cosponsored by IMA® (Institute of Management Accountants) and DePaul University, which is coming to Chicago on Friday, October 11, 2019, from 9 a.m. to 2 p.m. (check-in begins at 8:30 a.m.). The Conference will be held on the campus of DePaul University, 1 E. Jackson Blvd., Chicago, IL 60604.

Join like-minded colleagues in a lively discussion of how to expand your business network, develop leadership skills, and navigate opportunities to improve your career outlook. Hear from attendees and speakers – accomplished leaders, mid-career colleagues, and aspiring professionals – as they share their different perspectives in an interactive dialogue.

Topics will include:

- ◇ Strategies for success and advice for aspiring leaders
- ◇ A discussion of high-profile white-collar crime cases and the challenges of ethical leadership
- ◇ Managing professional challenges and achieving work/life balance

Register before September 27 to receive the Early Bird rate of just \$30 (regularly \$50). Enter promo code **WALSCHI30** at checkout to take advantage of this special offer. The registration fee includes 4 NASBA CPE credits continuing professional education (CPE) credits, a light breakfast, and an informal lunch.

Additionally, on Thursday, October 10, from 6 p.m. to 9 p.m., we're hosting a special movie night at DePaul University. Come to a free movie screening and discussion of *All the Queen's Horses*, the award-winning documentary about the largest municipal fraud in U.S. history. Earn up to 1.5 NASBA CPE credits. Join us for the movie, the Conference, or both.

[Register Now](#)

IMA 'S MISSION

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.

DFW Student Extravaganza

Mark your calendar for the September 27th DFW which will be held at Texas Wesleyan University, Fort Worth. The event is a one-day event focused on assisting accounting and finance students prepare for their professional careers. It will include presentations, employer/sponsor booths, resume reviews and networking. For more information, go to dfwimanet.org.

October Chapter Meeting Change: Different time and Format / More CPE

Plan to attend the Business Planning and Analytics meeting on October 17th. Registration starts at 12:00 noon. Lunch is provided. There will be three sessions (Budgeting and Forecasting, Data Analytics, and M&A Operational Overview) followed by a panel discussion with all speakers. For more information click [here](#).



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PO Box 612084
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