



North Carolina  
Triangle Area  
Chapter

August/September 2018 Newsletter

# The Motivator

## A Message from the Chapter President

Catherine Sabodish



Ready, Set, Go!!! We are off and running with a new IMA year!! I am looking forward to the fall for so many reasons. Cooler weather, pumpkin spice, fire pits, and oh...IMA EVENTS!!!! The fall looks so exciting for our Triangle Chapter. On September 20, we will be having a Dinner meeting at Prestonwood Country Club on Open Book Management with Chris McKittrick. This will be for 1.5 hours of CPE! Please see more details within the latest newsletter, and visit the website, <https://linkup.imanet.org/northcarolinatriangleareachapter>, to register. On Oct 12 we will be hosting an 8 hour CPE Fall conference at the Hampton Inn by Crabtree Mall. We already have a great

speaker line-up put together on some of hot topics, and of course, ETHICS!!! Again, more details in the newsletter on how to register. I look forward to seeing everyone at these events. I know we are going to have great turn outs, see the website for registration options. There is more to come, and look forward to sharing the news with you soon.

We appreciate your feedback and questions. Please contact me at [nctriangle@imachapter.org](mailto:nctriangle@imachapter.org)

Click Below to Join Us!



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### Our Next Event: 1.5 Hours CPE

When: September 20<sup>th</sup> (6:00 PM Social, 6:30 PM Dinner, 7:00 PM Speaker)

Location: Prestonwood Country Club

Presenter: Chris McKittrick, CPA, CGMA, CFE

Topic: Open Book Management

### OpenBookManagement:AHighLevelLook

Open Book Management (OBM) is a unique methodology and approach to running an organization. It is based on a simple, yet powerful belief, "When employees think, act and feel like owners.... everybody wins." This thoroughly tested operating system (as explained in Jack Stack's bestselling book "The Great Game of Business") teaches your people the fundamentals of business, involves them at levels they may never have been involved before, holds them accountable and provides them a stake in the outcome.

In this session, you will explore topics such as:

- Know & Teach the Rules
- Establishing a Critical Number
- Mini-Games
- Bonus Plan design in OBM

### 2018 Schedule of Events (Save the date!)

- September 20<sup>th</sup>
- October 12<sup>th</sup> Fall Conference (8 HRS NASBA approved CPE)
- November 15<sup>th</sup>
- January 17<sup>th</sup>
- February 21<sup>st</sup>
- March 21<sup>st</sup>
- May 16<sup>th</sup>

Please visit the website for up to date information on events and to register!

<http://nctrangle.imanet.org>

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IMA's Certification for  
Accountants and  
Financial Professionals  
in Business

## New CMA Recognition

The CMA® (Certified Management Accountant) is the advanced professional certification specifically designed to measure the advanced accounting and financial management skills that drive business performance in today's complex and challenging business environment. The CMA is tailor-made for finance professionals at all levels, whether they want to enhance their value to their current organization, or expand their career potential.

Congratulations to the Triangle Chapters New CMA's:

Robert Powell, CMA  
Ms. Jessica Newsome, CMA  
Krystal Frances Smith, CMA  
Shayna Hinshaw, CMA  
Mr. Bryon Kirkpatrick, CMA  
Mr. Gustavo Leandro Wzorek, CMA



## CONTINUING STUDIES

Through a partnership with The Institute of Management Accountants (IMA), Duke is proud to offer the Online CMAexcel Program, a review program for the CMA certification exam put forth by the IMA.

See more at:

[https://learnmore.duke.edu/  
certificates/accounting](https://learnmore.duke.edu/certificates/accounting)



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At all levels of the profession—from C-level executives to young professionals to students and academics—we offer valuable resources to enhance your career and power your business potential.

## Welcome to our new members!

IMA's 300 chapters worldwide provide a forum for networking with peers. Chapters offer a range of professional education programs, as well as leadership, mentoring, community service, and authorship opportunities. Membership in an IMA Chapter is exclusive to IMA members and is included in your IMA membership dues.

- Mrs. Leah Kilette
- Cheyenne Weeks
- Ms. Kelly G McAuliffe
- Mrs. Deitra Parker Jones
- Mr. Logan A Leitch
- Kaneshia K Hamilton
- Mr. Shamanth Sheshadri
- Mr. Venkatraman Rajagopalan
- Mr. Jonathan Lindberg
- Christina Byrd
- Theresa Meza
- David Humkey

## Recruiting

**Title:** Global Finance Graduate

**Job Description:** An exciting two-year program for a recent finance, business, accounting or economics graduate. The hire will be part of the Global Finance Graduate Program (start date September 2018). The program is based on three pillars; learning on the job and a smart mix of Performance Support and Learning & Development interventions (70:20:10). During the program the finance graduate will rotate in 4 blocks of 6 months of different assignments globally. The focus of the program will be on (personal) leadership + effectiveness and will consists of assignments exchanges and building connections.

If interested, please contact Scott Stafford [scottskippy@hotmail.com](mailto:scottskippy@hotmail.com)

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North Carolina  
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### 2018 -2019 NC Triangle Chapter Board

President – Mrs. Catherine M. Sabodish, CMA

VP of Administration – Mr. Vance A Josey

Director of Member Acquisition – Mr. Steve Drago, CMA, CPA

VP of Professional Education & Director at Large- Mrs. Jamie M. Long

Treasurer & Director of Employment Opportunity – Mr. Scott A Stafford

Secretary & Regional Council Delegate- Ms. Katherine A Santos-Rezendes, CMA

Director Retention – Mr. Tom G. Welsh, CMA

Director of Program Registration – Mrs. Ann Gray

Director of CMA Program & Student Activities – Mr. Timothy W Ketterman, CMA

Regional Council Delegate & Past President Carolinas Council- Mrs. Jamie M. Long

Director at Large – Mr. George P Golenbiewski, CMA, CPA

Director at Large – Mr. Jedadiah Luke Chilton, CMA

Director at Large- Mrs. Tanjina Khan

Director Website & Newsletter – Mrs. Angelica Taylor, CMA & Mr. Mike Billings

If you would like to participate on the board or have ideas for future events, please contact us  
**Nonprofit volunteers can deduct certain volunteer expenses on their tax returns.**



MA NC Triangle- Carolina Council, Fall CPE Event- 8 Hours (NASBA Approved)

### **Carolina Council's Note**

**IMA NC Triangle- Carolinas Council, Fall CPE Event- 8 Hours (NASBA Approved)**

**When: October 12, 2018 from 8:00 AM to 5:00 PM (ET)**

Associated with the North Carolina Triangle Area Chapter

Location: Hampton Inn & Suites Crabtree Valley  
3920 Arrow Drive, Raleigh, NC 27612

Features: 8 Hours CPE including Ethics

Ted Kazaglis, J. D.– **Employment Law Update - What you should know**

Jamie Long, MBA – **Misplaced Trust – Devasting Fraud (Ethics)**

Ginger Rothrock, Ph.D. – **Packaging Your Idea – How Finance can bring Innovation**

Victor Font- **Introduction of Cybersecurity, The Cybersecurity Ecosystem**

William Voorhees, MFA, CAMS, CFE- **What is Bitcoin and How Blockchain works**

Cost before Oct. 7<sup>th</sup>

- All sessions and Lunch- \$150 for IMA Member
- All sessions and Lunch \$175 for Non IMA Member
- Students- \$60

Cost for all is \$175 after Oct 7<sup>th</sup>

Note: Continental Breakfast and Gourmet Deli Lunch is included for all attendees.

<https://www.regonline.com/nctrianglefallcpe2018>

## IMA Global Note

IMA's mission is to provide a forum for research, practice development, education, knowledge sharing, and advocacy of the highest ethical and best business practices in management accounting and finance.

Our webinar program enhances your career by bringing you the latest thought leadership and developments in the profession.

### Upcoming Webinar:

### **Performance Reporting: The Holy Grail of Finance Inside Talk**

September 20, 2018 1:00 PM – 2:00 PM



Strategic Finance™ is the award-winning flagship publication of IMA® (Institute of Management Accountants). Every month, our thought-provoking articles offer advice that helps financial professionals perform their jobs more effectively, advance their careers, grow personally and professionally, and make their organizations more profitable. SF is consistently rated by IMA members as one of the most accessed and valued benefits of membership.

## Women in Financial Leadership

By Ramona Dzinkowski

Defining the qualities of great leadership is a daunting task. There are many different leadership styles, and the qualities sought in a leader have changed dramatically over the decades. For women in finance, the good news is that we in business are currently in an era of leadership that embraces the specific strengths that women executives bring to the table.

So what does it take to be a great leader in 2018, and how do companies attract and retain the right talent to develop leaders for the future? And what are the key takeaways from women in top finance jobs about what it takes to be a successful leader today?

### GREAT LEADERSHIP QUALITIES

The literature is vast on what makes a great leader, regardless of gender. One recent example from a Harvard Business Publishing research report, “The State of Leadership Development” (<https://s.hbr.org/2vq7cfe>), reveals that the most valued leadership qualities include demonstrating integrity, managing complexity, inspiring engagement, and acting strategically.

<http://sfmagazine.com/post-entry/september-2018-women-in-financial-leadership/>



## North Carolina Triangle Area Chapter

### Sponsors

Our Sponsors allow us to continue to operate and provide quality educational and CPE events to our members at affordable cost. We are looking for **Hospitality Sponsors of \$100** for each of our CPE events. The sponsor will get time to tell the audience about their organization, as well as make literature or promotional material available to attendees.

Would you like to get your message out to over 400 of the area's dedicated accounting and finance professionals?

To place an ad in The Motivator please contact [imanc406@gmail.com](mailto:imanc406@gmail.com).

Newsletter is distributed  
through online media platforms.



The Lundy-Fetterman School of Business provides students with a comprehensive professional education that instills in them a commitment to service, lifelong learning, ethical behavior and the free enterprise system.



As a North Carolina Triangle Area Chapter member, you receive significant discounts on the Gleim Premium CMA Review System. Contact your Gleim Chapter Coordinator at 800.874.5346 ext. 131 or [imachapters@gleim.com](mailto:imachapters@gleim.com) to take advantage of the offer or if you have any questions.