North Carolina
Triangle Area
Chapter

January 2019 Newsletter

The Motivator

A Message from the Chapter President

Catherine Sabodish

Thank you for all that came out to our January dinner meeting. I apologize for issues with the website registration. The maintenance of the website was transitioned, and there is a slight learning curve with the change. We have another CPE dinner meeting coming up on February 21st. A speaker from HPG will be providing a tax update. There will be more information on the website very soon. Registration will open for this event by February 1st, visit This Link To Our Chapter Page, and click on Events to find registration.

In addition, registration is now open also for the Carolina's Council IMA Spring conference in Myrtle Beach, SC. Dates for this event are April 25-26th. Use https://www.regonline.com/builder/site/Default.aspx?EventID=2550721 to register for this annual council event.

Thank you for your continued support of our chapter. Should you have any questions or concerns regarding upcoming events please don't hesitate to reach out to me for more information.

Thank you!
Cathy Sabodish, CMA

We encourage you to check out our Facebook page at http://www.facebook.com/IMANC406/ , as well as our LinkedIn page at www.linkedin.com/groups/3884390.

We appreciate your feedback and questions. Please contact me at nctriangle@imachapter.org

Click Below to Join Us!

In this issue:

Our Next Event: 1.5 Hours CPE with Toys for Tots Drive

When: February 21st (6:00 PM Social, 6:30 PM Dinner, 7:00 PM Speaker)

Location: Prestonwood Country Club

300 Prestonwood Pkwy Cary, NC 27513

Presenter: HPG

Topic: **Tax Update**

2018 Schedule of Events (Save the date!)

- November 15th
- January 17th
- February 21st
- March 21st
- May 16th

Please visit the website for up to date information on events and to register!
http://nctriangle.imanet.org

CMA® | *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:

Mrs. Donna Jean Thedford, CMA
Mr. Lawrence S Jenkins, CMA

Duke UNIVERSITY | 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

ima® North Carolina Triangle Area Chapter

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.

- Ms. Deanna O'Pharrow Anderson
- Mary Lewis
- Jaclyn Burns
- John Kabisa
- William Hall
- Kristina Marie Mueller
- Kyle Sisolak
- Jacob Heintze
- Mr. Patrick Neal Stewart
- Baiyang Huang
- Kevin Agnew
- Ms. Maticia C Sims
- Ms. Patreka Wortham
- Mr. Terry Lee Strickland Jr.
- Thomas James Lide
- Amanda Barie Broyles
- Ms. Yuvette Og
- Beverly Moore
- Nathan Hayes
- Ms. Lorri J Sampson
- Mr. Maxwell R Andre

North Carolina Triangle Area Chapter

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.

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:
Mentoring – The IMA Way
Leadership Academy

February 05, 2019 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.

Finding the Right Side of the Line

By Russell (Rusty) Calk, CPA
January 1, 2019

I was sitting in my office, visiting with a partner from KPMG before his presentation to my class. During the conversation, I mentioned to him that I wanted to start talking with one of his audit seniors about returning to school to pursue a Ph.D.

He said, "You mean Heather, right?" Getting her Ph.D. had always been part of Heather's long-term plan, and she had shared that with the partner during the interview process before she accepted her offer at KPMG. She did, in fact, complete her Ph.D. at the University of Alabama in May 2016 and is now on the faculty at Texas Tech University.

But I wasn't talking about Heather. I said, "Becky." He flinched. It took him a few seconds to gather his thoughts. When he did, he gave his blessing and said that he would support Becky in whatever she decided to do. KPMG, after all, prides itself on creating opportunities for its people. It was the answer I expected.

Later, I reflected on that conversation and, in particular, the partner's reaction. He had seen countless talented people come and go over his career. I know that he saw that as a necessary aspect of the business model. As turnover happened, he typically reacted with a metaphorical pat on the back, sincere well wishes, and the script provided by HR.

But Becky was different. She added more to her teams than just the technical competence to do her job. The partner's reaction made it clear: Becky would be hard to replace. And as I started looking around, I found Beckys in other companies and firms. They existed at all levels from entry level to partner or senior executive. I wanted to know what set them apart.

Over the course of two years, I, along with 32 student officers of a Beta Alpha Psi chapter and a dedicated group of nine partner- and senior executive-level professionals (see the acknowledgments) from eight different organizations, set out to answer that question. The simple answer, of course, was a focus on soft skills, or what Ken Bouyer, the Americas Director of Inclusiveness Recruiting at EY, calls "survival skills." While accurate, we weren't looking for the simple answer. We wanted a specific, detailed conclusion.

During these two years, we studied leadership experts such as Jim Collins, John Maxwell, and John Wooden. In open, oftentimes passionate discussions, we challenged their ideas and our own preconceptions. We emerged from these discussions with an identity we dubbed a right-side-of-the-line (RSOTL) professional and a set of attributes called a character map that an aspiring professional can use to help move to the right side of the line.

A young engineer at Sandia National Laboratories met with Phil Montoya, his mentor and one of the professionals involved in developing the character map. The engineer shared his frustration, saying, "I know I am smart and talented, but so is everybody else that works here. How do I set myself apart?" Phil shared our work, and the young engineer seized the opportunity to take his career to another level.

ou can find the attributes on the character map throughout existing leadership and professional development literature. The model seems to resonate. From public accounting to industry and governmental accounting, and from federal law enforcement to K-12 public education, leaders react to the model as if it captures a vague idea that they have been trying to articulate.

Becky did eventually leave KPMG to pursue her doctoral studies. The management team at KPMG didn't try to dissuade her from following her dream, yet they did make it clear that the door remained open any time she wanted to return. Becky completed her Ph.D. at the University of Oregon in June 2017 and is now on the faculty at the University of Texas at El Paso.

https://sfmagazine.com/post-entry/january-2019-finding-the-right-side-of-the-line/

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.
Newsletter is distributed through online media platforms.

CAMPBELL UNIVERSITY
LUNDY-FETTERMAN SCHOOL OF BUSINESS

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.

GLEIM CMA Review — Official Marketing Partner — ima

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 to take advantage of the offer or if you have any questions.

Gleim has recently added the following courses to our Online CPE catalog:
- Accounting Standards and SEC Reporting
- Adjustments to Income Tax Liability: Credits, Alternative Minimum Tax, FICA (2018)
- Bankruptcy
- CIA Ethics
- Contracts: Elements
- Corporate: Taxable Income (2018)
- Individual: Above-the-Line Deductions and Losses (2018)
- Individual: Accounting Methods, Filing Status, and Dependency Status (2018)
- Individual: Business Expenses/Losses (2018)
- Individual: Exclusions from GI (2018)
- Individual: Gross Income (2018)
- Practice Before the IRS (2018)
- Property Transactions: Character and Recognition for Property Sales and Exchange (2018)
- Revenue from Contracts with Customers
- The Vacation Home (2018)

View these new courses as well as our entire listing of over 75 courses including those which cover Accounting, Auditing, Regulatory Ethics, Management, Business Law, and Taxation at http://www.gleim.com/accounting/cpe