



THE BOTTOM LINE

May 2026

Watch for email regarding summer Program planning dates for Fiscal year 2026-2027. All are welcome!

"Do the best you can until you know better. Then when you know better, do better." - Maya Angelou

Welcome to our new member

Jael Cordero

Congratulations to our new CMA

Michelle Johnson, CMA



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President's Message

Dear Members,

As we approach the end of our chapter year, I want to take a moment to reflect on what we've accomplished together and to invite you to join us for a very special occasion: **our final meeting of the year** and my **last meeting as Chapter President**.

Over the past year, our chapter has:

- Strengthened our local professional network through engaging in-person and virtual events.
- Provided high-quality CPE sessions that addressed timely topics in management accounting, finance, and leadership.
- Supported students and emerging professionals as they prepare for careers in accounting and finance.
- Fostered a community where members can share knowledge, build relationships, and grow together.



None of this would have been possible without the commitment of our **board**, our **volunteers**, and **you**, our members. Your participation, whether by attending meetings, presenting, mentoring, or simply spreading the word, has been the driving force behind our chapter's success.

I invite you to attend our **final chapter meeting of the year** on May 19th 2026 at Elizabeth's about "[Working through others to Achieve results](#)". This meeting will be a chance to earn valuable CPE, hear from a seasoned speaker on when and how to effectively work through others, recognize our volunteers and board members, welcome the incoming chapter leadership team, enjoy some good food, some laughs and some great conversation and celebrate the closure of another successful chapter year together.

Your presence matters. Whether you are a long-time member, a new member, or someone considering joining IMA, **you belong** and this is the perfect opportunity to reconnect, expand your network, and help shape the chapter's future. This meeting will also mark my final event as President of the IMA Hartford Chapter. Serving in this role has been an honor and a privilege. I am deeply grateful for the trust you placed in me to lead our chapter, the dedication and professionalism of our board and committee members, and the friendships and connections built along the way.

Leadership is never about one person; it is about continuity and community. I'm excited about the energy and ideas that **our incoming President** and leadership team will bring, and I'm confident that the chapter is in excellent hands. Although I am stepping down as President, I am not stepping away from this community. I look forward to continuing to support the chapter as a member and in my new leadership role at the NorthEast Regional Council, and **I encourage each of you** to consider how you [might get more involved](#) whether by joining the program planning for the new fiscal year, serving on a committee and volunteering/advising the Board, volunteering at an event, speaking or presenting a topic, participating in a campus visit, helping our NERC colleagues with the professional and student conferences, or recommending our chapter to colleagues and students.

Trust me... **your involvement—large or small—makes a real difference!!!** You can help write that next successful chapter! Thank you for your support, your engagement, and your commitment to our Chapter. It has been a pleasure and a privilege to serve you. I hope to see you at our final meeting of the year as we celebrate what we've achieved and look ahead to what's next for IMA Hartford.

Warm regards,

Dante Roccasecca

Hartford Chapter President, 2021-2026

droccasecca@kpmg.com

HARTFORD CHAPTER MEETING DETAILS

“Working Through Others to Achieve Results”
by Kelly McDaniel, Director of Business Owner Services, CTWM
May 19, 2026 5:30 PM to 8:30PM (1.5 CPE)

Summary: In this interactive presentation, members will learn not only tools and techniques for working through others but also the philosophy behind when and how it’s important. Participants will:

- Understand the effects maintaining control versus letting go has on overall performance
- Gain insight into how they spend their time, and incorporate strategies for offloading and delegating those things they shouldn’t be doing
- Study technique for effectively delegating work to others
- Learn how to give feedback, listen to, and coach others when they aren’t meeting expectations.



Speaker: Kelly McDaniel serves as Director of Business Owner Services at Connecticut Wealth Management (CTWM), where she partners with business owners to strengthen one of the most critical drivers of long-term success: their people. Kelly brings more than 25 years of experience in organizational development consulting. She began her career in management with the Gannell family of newspapers before transitioning into consulting, where she was mentored by Bob DeLisa, founder of DeLisa-Group. Kelly earned her undergraduate degree from Binghamton University and her MBA from the University of Connecticut. Kelly is active in the Connecticut business community and frequently serves as a speaker and facilitator for local and national organizations. She has served as an Adjunct Instructor in the Business Department at Manchester Community College and the Board of Directors for the Connecticut chapter of the National Tooling and Machining Association, where she chaired the Workforce Development Committee.



Kelly resides in Simsbury with her husband, Sean, and their two teenagers. She is a dedicated sports mom, supporting track, cheerleading, and Simsbury Trojan athletics. Outside of work, she enjoys traveling, cooking, and gardening, often accompanied by her family dog, Lucy.

Where: Live Event - Registration required in advance. Please click [here](#) to register for the Event.



Tues, May 19 Meeting Agenda and Details

Networking 5:30pm | Dinner 6:15pm | Technical Session 7:15pm

Reservations requested by May 14

RSVP on our [website](#) (Select the Generate an invoice option when you register on website; Payment will be collected at the door)

Location: Elizabeth's Bar & Restaurant, 825 Cromwell Ave, Rocky Hill, CT 06067

Buffet: Chicken Milanese, Eggplant Parm, Sweet Sausage Rose over Penne, Marinara over Penne, House Salad, Red Roasted Potatoes, Vegetables and cookies

Cost: IMA and NABA Members \$25 (non-member professionals \$30), Full-time Student (Members and non-members) Free, Technical Session Only (all members/non-members) \$5, **Cancellation Policy:** Full Amount charged if a reservation including the meal is not cancelled within 24 hours of the event

Directions to Elizabeth's

From Hartford on I91 Southbound: Take exit 23 toward CT-3/West Street/Rocky Hill. Go for 0.3 mi. Turn right onto West St. Go for 0.3 mi. Turn left onto Cromwell Ave (CT-3). The plaza is immediately on your right. Elizabeth's is on the left side of plaza.

From New Haven on I91 Northbound: Take exit 23 toward CT-3/West Street/Rocky Hill. Go for 0.5 mi. Turn left onto West St. Go for 0.4 mi. Turn left onto Cromwell Ave (CT-3). The plaza is immediately on your right. Elizabeth's is on the left side of plaza.



Elections Committee to Meet in May

In following the new IMA Global directive for Board and Volunteer/Advisor positions for the next fiscal year, the following chapter members volunteered and will serve on the IMA Hartford Chapter Elections Committee:

Dante Roccasecca, Ron Seguljic, Mike Krahn, Erin Pirro, Carol Magner Mitchell and Pavan Bolla. Dante will act as Chair.

They will review the volunteer applications as submitted via Global's new approach for nominations and determine the new board leader assignments for fiscal year 2026-27 as well as coordinate the Volunteer/Advisor positions which we expect to align with our prior structure to meet local needs for program development. If you were interested to join this committee and had not already reached out to ask, please email Dante directly at droc-casecca@KPMG.com.

Finally, if you are interested in championing the IMA Hartford Chapter through a Board position or Volunteer/Advisory activities, click on IMA Global's [link](#) to express your interests. Please join our great group of local folks in planning chapter activities and support for our membership. Just know that you risk having some fun and camaraderie along the way!! And if you already filled out the online form, we congratulate and thank you!!

Institute of Management Accountants Hartford Chapter 2025 – 2026 Program Calendar

[N] Social/Networking - [O] Onsite - [V] Virtual

August 26, 2025 @ Yard Goats Game
@ Dunkin Donuts Park – Hartford [N]

September 14-16, 2025, Annual Fall Conference [O]
Groton – Please RSVP w/ NERC

October 21, 2025 @ Aerospace Techniques, Inc.
Middletown – Plant Tour [O]

November 18, 2025 @ Elizabeth's, Rocky Hill [O]
Anna Mumford – Cybersecurity Consultant, CONNSTEP
"Accounting for Risk: Building
Cybersecurity Resilience & Compliance"

December 16, 2025 @ Indian Hills CC, Newington [O]
Mark Zampino – Founder, Zampino Communications
"Connecting the Dots: True Networking"

January 20, 2026 – Webinar [V]
Brian Trueman, CBI – Managing Director-Tax, KPMG
"One Big Beautiful Bill: Unpacking
the Latest Congressional Tax Reform"

February 7, 2026 (SAT) @ Midwest FoodBank,
Manchester – Volunteer Event [N]

February 17, 2026 @ Camp Courant, Farmington [O]
Darwyn Azzinaro – Senior VP, Liberty Bank
"The ABC's of Project Management-Project Scope"

March 17, 2026 @ J. Timothy's Tavern,
Plainville – Networking Event [N]

April 21, 2026 @ Indian Hills CC, Newington [O]
Michael Krahn, CMA, CSCA, CPA
CEO, Remarc Consulting
"How to Successfully Implement
AI Projects at Any Organization"

May 19, 2026 @ Elizabeth's, Rocky Hill [O]
Kelly McDaniel – President, DeLisaGroup
"Working Through Others to Achieve Results"

Have a question? Use the contact information below:

Email: Hartford@IMACHapter.org

Website: hartford.imanet.org

Instagram: @IMAHartford

Facebook: Institute of Management Accountants – Hartford Chapter

LinkedIn: Institute of Management Accountants – Hartford Chapter

Proud Chapter of the IMA NorthEast Regional Council (NERC)
<https://nerc.imanet.org>



Become an IMA Mentor! 1 Hour a Month Can Change a Student's Path

IMA has joined **SetFire Foundation's Sparks Mentorship Program**, connecting US students with professionals who can guide, inspire, and open doors. The Sparks Mentorship Program is a program for college sophomores, juniors and seniors to help guide them through their education and prepare them for their next chapter.

There's a growing need for mentors, and We're inviting IMA members to share just one hour a month with an accounting or finance student, offering the kind of real-world advice that only experience can teach. All mentoring is done "virtually" so this opportunity is open to all Campus Influencers and IMA members. Together, we can help more students find their footing in the profession we love.

- Become a mentor: www.setfirefoundation.org/mentor
- Student sign-up: www.setfirefoundation.org/student

IMA Annual Conference 2026 Jun 14 – 17, 2026

Finance Transformation: From Strategy to Action in Florida. IMA26 equips accounting and finance professionals with the tools, insights, and connections to turn uncertainty into opportunity and propel your organization forward. Over three dynamic days, you'll collaborate with peers on today's most pressing challenges through hands-on learning, interactive case studies, and specialized tracks. Registration now [Open!](#)



Member Spotlight - JP Avenoso

JP Avenoso is an Accounting Administrator at the Metropolitan District Commission (MDC), where he brings a dynamic and forward-thinking approach to financial leadership. With a career spanning public accounting and internal audit within a Fortune 500 environment, he has built a strong foundation in technical accounting, risk management, and operational insight—positioning him to drive meaningful impact in complex organizational settings. Known for his analytical mindset and commitment to continuous improvement, JP approaches accounting as a strategic function—one that enables transparency, accountability, and long-term value creation. He is particularly focused on building efficient systems, improving financial visibility, and aligning financial operations with broader organizational goals.

Since joining the MDC, JP has demonstrated a consistent ability to lead through growth and change, quickly advancing into his current role. He now plays an integral part in overseeing and supporting critical financial functions, including the annual audit process, governmental accounting, inventory and material management, payroll, accounts payable, and budget forecasting and analysis. His work not only ensures accuracy and compliance but also strengthens internal processes and enhances the organization’s ability to make informed, strategic decisions. In addition to his professional responsibilities,



JP recently served as a speaker at the IMA NorthEast Regional Council’s (NERC) Student Conference at Elms College, where he shared insights into the day-to-day life of an accounting professional. Drawing from his experience across his career, JP provided students with a practical perspective on career pathways, industry expectations, and the evolving opportunities within the field. His presentation focused on helping future professionals better understand what to expect as they transition from academics into the workforce, while emphasizing the importance of adaptability, continuous learning, and professional growth.

Outside of his professional responsibilities, JP values time spent with his family and his dog, Wyatt. He is an avid golfer and also enjoys cooking and grilling, appreciating the creativity and discipline these hobbies require—qualities that closely mirror his professional approach. As a member of the Institute of Management Accountants, JP remains committed to professional growth, ethical leadership, and contributing to the continued advancement of the accounting profession.

Photos from April meeting





Student, Faculty and Certifications Corner

Student Resources

Student Chapters

[Student Chapters | IMA \(imanet.org\)](#)

[IMA Student Membership | IMA \(imanet.org\)](#)

There are a lot of programs/certifications that IMA Global offers free to students. Search for that and take advantage where you can. It can be a great addition to your resume and to your Online Linked In profile

Here's where you can start if you want to enroll as a mentee and find a mentor.

[Engage in Mentoring - Institute of Management Accountants](#)

- Become a mentor: www.setfirefoundation.org/mentor
- Student sign-up: www.setfirefoundation.org/student

CMA and FMAA scholarship info

<https://www.imanet.org/ima-certifications/cma-certification/students/scholarship>

[IMA Student Case Competition](#)

The IMA Student Case Competition challenges your team to think analytically and strategically to solve a global business case.

Gleim Discounts on CMA Study Materials

Hartford Chapter members receive a 20-30% discount on all Gleim CMA study materials. Gleim is the most widely used CMA review program, having trained more CMA candidates than any other course on the market. Contact Vanessa Neely at vanessa.neely@gleim.com, or call 1-800-874-5346 ext 422, to take advantage of this offer or for more details.

You can also contact our Chapter CMA Director, Kristina Cotoia at Kristina.Cotoia@sbdinc.com who will be able to guide you along the path to earning the CMA designation.



CMA - Boost Your Earnings Potential!

Why Become a Certified Management Accountant

The CMA credential is the worldwide gold standard in certification for accounting and finance professionals within the business world. Earning your CMA demonstrates the fact that you have mastered critical accounting and financial management skills. The CMA is not tied to any formal laws or regulations of any company, but instead shows that you understand the connections between finance/accounting and operations as well as how to make your business function effectively. The median base salary and total compensation for those holding the CMA is significantly higher compared to those who don't hold the certification. Overall, the difference in median total compensation between CMAs and non-CMAs is \$29,000. This means that a CMA earns 58% higher median total compensation compared to a non-CMA.* Visit IMA [Website](#) for more information to get started.

To Become a CMA

- Pay IMA Membership Fee
- Obtain bachelor's degree from an accredited college or university or an equivalent degree as determined by an independent evaluation agency
- Pay CMA Entrance Fee
- Complete Part 1 (Financial Planning, Performance, and Analytics) of the CMA Exam
- Complete Part 2 (Strategic Financial Management) of the CMA Exam
- Fulfill two continuous years of professional experience

To Sit for the CMA

- You do NOT need to have a bachelor's degree to sit for the CMA exam, you can sit for it before graduation.
- Your degree does NOT need to be in Accounting or Finance.
- You have a three year span to sit for and pass the two parts of the CMA exam.
- Exams are offered in January and February, May and June, and September and October.

Maintaining CMA Credential

- Complete 30 hours of CPE credit annually (including 2 hours of ethics)
- Pay IMA Membership Fee
- Pay CMA Maintenance Fee

About the CMA Exam

The Certified Management Accountant (CMA) designation provides corporate management and individual members with an objective measure of knowledge and competence in the field of management accounting. It is an invaluable credential for professional advancement and for broadening professional skills and perspectives.

The CMA consists of two parts:

- Part I: Financial Planning, Performance, and Analytics
- Part II: Strategic Financial Management

Both, Part 1 and Part 2, will be 4 hours in length (3 hours for 100 multiple-choice questions and 1 hour for 2 essay questions). There are multiple resources provided through Gleim to help you through the process.

* IMA Global Salary Survey (Published 2021)



CSCA - Accelerate Your Career!

The CSCA® (Certified in Strategy and Competitive Analysis) is a specialty credential designed specifically for CMAs*, which complements and expands upon the strategic planning and analysis skills developed through the CMA® (Certified Management Accountant) certification. This credential will help you master the concepts and techniques that are required to become a key player in driving the strategic planning process at your organization. The CSCA exam will cover and test three content areas: 1. Strategic Analysis, 2. Creating Competitive Advantage, and 3. Strategy Implementation and Performance Evaluation. The CSCA is for Certified Management Accountants who: Hold positions ranging from staff accountant to CFO and Aspire to expand their strategic planning knowledge for current or future roles.

- ◇ **CSCA Program Entry and Exam Registration: \$600**
- ◇ **CSCA Program Entry, Exam Registration and IMA Strategy and Competitive Analysis Learning Series®: \$1,295**
- ◇ **IMA Strategy and Competitive Analysis Learning Series®: \$695**

Invest in your professional growth and get started on your CSCA journey! By passing the exam, you will earn 30 CPE credits, which can be used towards your annual CPE requirement. Not ready for the exam? Take the IMA Strategy and Competitive Analysis Learning Series® first and sit for the exam at your convenience. You can earn up to 21 NASBA CPE credits while you study. Visit [IMA Website](#) for more information to get started.

FMAA - Early Career Professionals

IMA is proud to offer the [FMAA \(Financial and Managerial Accounting Associate\)](#), a foundational certification aimed at providing early-career professionals in accounting and finance with fundamental knowledge and competencies. In response to a shortage of professionals in the field, the FMAA aims to break down traditional barriers of entry into the profession. The FMAA covers five content domains, including general accounting, financial management, and professional ethics.

You can register to take the two hour exam of 80 multiple choice questions at Prometric testing centers near you.

Contact Us

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