The Association of Accountants and Financial Professionals in Business

Hartford IMA Chapter Newsletter Volume 48, Issue 3

THE BOTTOM LINE

November 2026

Upcoming IMA Global Webinars

Tuesday, Nov 10
AI Analytics in Finance
1:00 PM - 2:00 PM

Wednesday, Nov 18
Hidden Money in Plain Sight: R&D Tax Credits and Retirement Strategies
1:00 PM - 2:00 PM

Wednesday, Dec 9
Governing AI in Accounting: Controls, Accuracy, and Adoption
1:00 PM - 2:00 PM

"If you don't like the road you're walking, start paving another one." – Dolly Parton



In This Issue

- President's Message (P.2)
- Hartford Chapter Highlights and Events (P. 3-8)
- Student, Faculty & Certifications Corner (P. 9-11)

President's Message

Dear Members,

November is a wonderful time to pause and appreciate the professional relationships and connections we've built throughout the year. For the IMA Hartford Chapter, those connections are at the heart of what we do.



This month gives us two great opportunities to come together.

On Saturday, November 7, the Northeast Regional Council and IMA Global will host an in-person Chapter Leadership Training at Midwest Food Bank New England in Manchester, CT. Following the training, participants will have the opportunity to give back by helping with food sorting and packing. Whether you're currently involved in chapter leadership, interested in becoming more involved, or simply looking for a meaningful way to connect with fellow IMA members, we hope you'll join us.

Then, on Tuesday, November 17, we're excited to welcome Kelleigh Marquard from Robert Half to the Hartford Chapter for "The Demand for Skilled Talent in a Shifting World." Kelleigh will provide a timely look at the skills being sought in today's marketplace. The evening at Elizabeth's Restaurant in Rocky Hill will also give us plenty of time for networking, dinner, and connecting with colleagues.

I hope you'll make time to join us for one or both of these events. They reflect what I value most about our IMA community: opportunities to learn, connect, lead, and give back.

As Thanksgiving approaches, I'm especially grateful for everyone who contributes to the continued success of our chapter. Thank you to our members, volunteers, board members, and speakers for your time, enthusiasm, and continued support.

I look forward to seeing many of you in November and wish you and your families a happy and restful Thanksgiving.

Katy Hone, CMA, CPA
Chair, IMA Hartford Chapter
katyhone@gmail.com

Chapter Leadership Training and Food Bank Volunteer Activity Hosted by NERC on November 7, 2026

The NorthEast Regional Council has organized with IMA global to provide an in person Chapter Leadership Training in Manchester CT. Whether you're on the Board, a current Advisor/Volunteer and/or just want to meet, greet, network and/or serve the community while learning a bit about IMA leadership options, this one's for you. IMA Chapter Leader Training is presented by Juliana Napalit and Emma Neu (IMA Global). This session is designed to equip you with essential information on programs, processes, and resources to help you effectively engage your local IMA community, grow awareness of IMA, and highlight the value and benefits of chapter membership.

This training will cover:
- Recognition and training for chapter volunteers
- Best practices for marketing your events
- Administrative processes
- Available resources

Join us for just the training, just the volunteer activity, or both. All are welcome!!

When: Saturday, November 7, 2026 from 9:00 AM to 12:00 PM. Leadership Training 9:00 AM - 10:15 AM and Volunteer and Networking 10:20 AM – Noon. We will be packing food for the Midwest food bank then enjoy optional lunch (attendees will cover their own meal costs) at a place to be determined.

Where: Midwest Food Bank, 440 Adams Street, Manchester, CT 06042

How: RSVP online on IMA NERC website or email northeastregionalima@gmail.com for assistance.

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HARTFORD CHAPTER MEETING DETAILS

"The Demand for Skilled Talent in a Shifting World"

by Kelleigh Marquard, VP & Practice Director, Robert Half

November 17, 2026, 5:30 PM to 8:30PM (1.5 CPE)

Summary: "The Demand for Skilled Talent in a Shifting World" is your guide to what's happening with the hiring market and the latest recruiting trends. This presentation is updated for the second half of 2026 and dives into how AI adoption, growing skills gaps and shifting business priorities are pushing companies to rethink how they attract, hire and retain talent. Attendees will also get insights about what skills and roles are most in demand now, the growing complexity of candidate evaluation, why succession and pipeline planning are essential to sustaining growth, and more.

Learning Objectives:

- Understand the major labor market and hiring trends influencing demand for talent in 2026, including the impact of AI, skills shortages and shifting workforce dynamics.
- Identify common hiring challenges—such as increased application volume, skills validation and talent scarcity—and strategies to address them effectively.
- Recognize the role of upskilling, contract talent and specialized recruiting in closing skills gaps and supporting strategic priorities.
- Learn why proactive succession and pipeline planning is critical for organizational continuity, knowledge transfer and long-term leadership readiness.



Speaker: Kelleigh Marquard is a Vice President and Practice Director at Robert Half, where she leads the permanent placement practice for accounting and finance professionals across Connecticut and Western Massachusetts. Since joining Robert Half in 2007, Kelleigh has earned numerous promotions and consistently ranked among the company's top producers, both locally and internationally. Throughout her career, Kelleigh has held several leadership positions, including overseeing permanent placement, temporary staffing, and consulting operations across five offices in Connecticut, Massachusetts, and New York. With nearly two decades of experience partnering with finance executives and organizations of all sizes, she brings a unique perspective on evolving labor market trends, talent acquisition strategies, and the challenges employers face in attracting and retaining skilled professionals.

Where: Live Event - Registration required in advance. Please click here to register for the Event.

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Tues, Nov 17 Meeting Agenda and Details

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

Reservations requested by Nov 12

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: Roasted Chicken, Chicken Milanese, Eggplant Parmesan, Roasted Potatoes, Sweet Sausage Rose over Penne, Marinara over Penne, House salad, Vegetables & Dessert

Cost: IMA and NABA Members $25 (non-member professionals $30), Full-time Student (Members and non-members) Free, Technical Session Only (all members/nonmembers) $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.

A Combining Fun and a Bit of Networking while Learning

By Carol Magner Mitchell

October 20th, our local Hartford chapter of the IMA, along with employees from ARI, enjoyed an engaging tour and talk at the Stowe Center for Literary Activism, where participants learned about the enduring legacy of Harriet Beecher Stowe, author of Uncle Tom's Cabin. Karen Fisk, Executive Director, and Casey Grambo, Director of Development, kindly stayed late and hosted us for this special late afternoon/early evening visit. Highlights included a discussion of the organization's mission to inspire social justice and civic engagement, as well as the $4.6 mill state-supported restoration efforts for the historic properties and ongoing renovations to the gardens and grounds. A particularly interesting takeaway was that Stowe's advocacy extended beyond abolition; she also helped drive causes such as women's rights and suffrage, reflecting her broad commitment to social reform. The tour offered a fascinating reminder that many of the issues that inspired activism in Stowe's time, including equality, civic participation, and the power of informed dialogue, continue to be relevant and debated today.

Embracing the Center's vision that engagement leads to empathy, attendees were invited to revisit the site, and to encourage fellow members who were unable to attend, to experience one of its more extensive tours. Such programs offer a unique opportunity to deepen one's appreciation of diverse perspectives and expand one's broader view of humanity.

Following the tour, some members joined together to have dinner before heading home. Many thanks to our 2026-27 Chair Katy Hone for facilitating this tour and networking event on this year's program schedule. It was fun as well as educational and it's right in your back door in Hartford. Do check it out yourself!



Register now to save up to $300 with presale pricing and put your 2026 professional development budget to work before it expires on Dec. 31.

At IMA27, you'll:

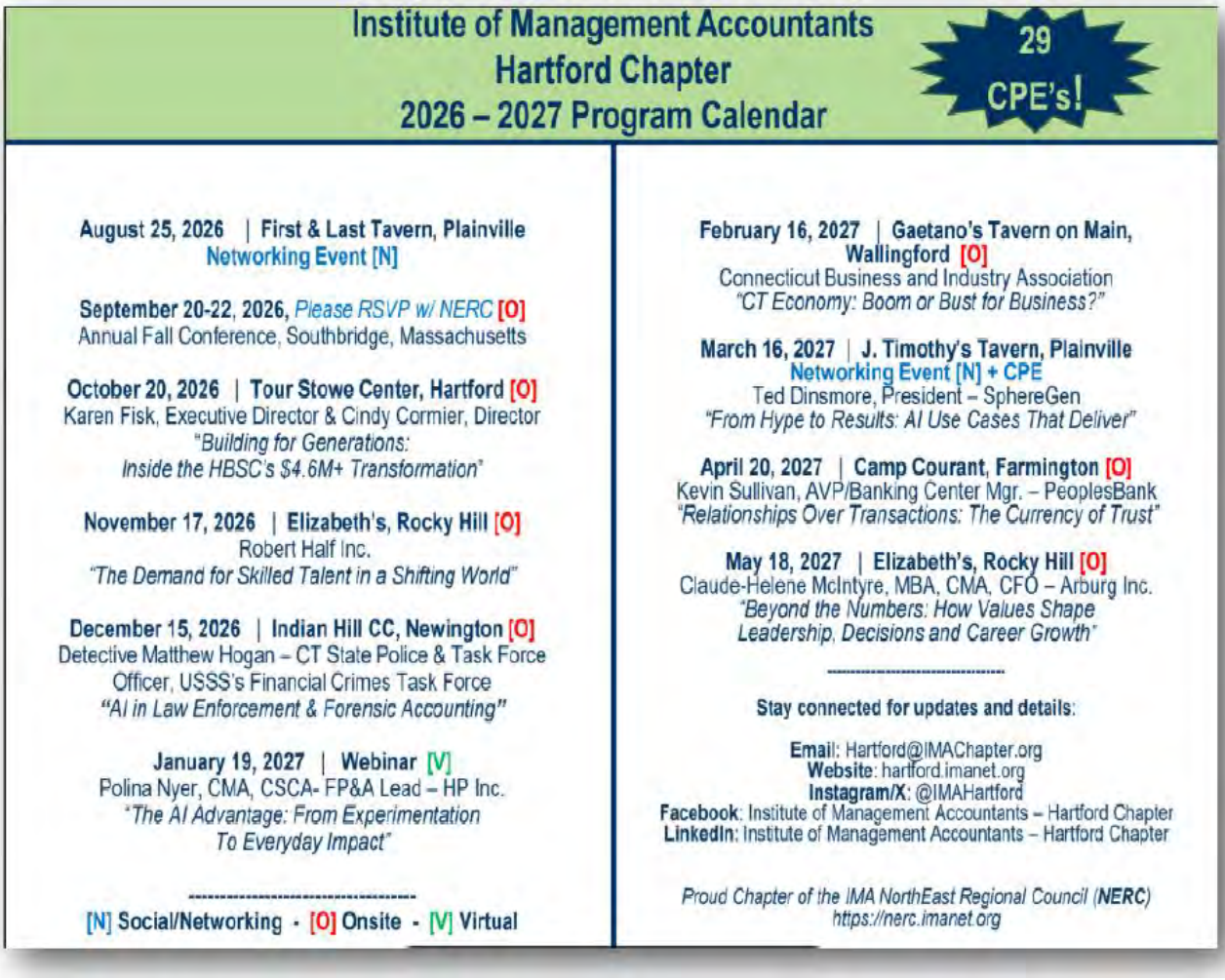
- Build your skills with hands-on sessions on AI, analytics, automation, and more
- Find your people in tracks designed for your career level
- Make lasting connections with peers, CFOs, and innovators
- Have fun in San Diego with a community that gets it

Photos from Tour of Stowe Center





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Save the Date for NERC Annual Fall Conference

September 19 - 21, 2027 @ Foxwoods Resort and Casino, CT

Earn CPEs while networking with professionals

Student, Faculty and Certifications Corner

Student Resources

Student Chapters
https://www.imaglobal.org/

IMA Student Membership:
There are many programs and certifications that IMA Global offers free to students. Search for them and take advantage where you can. They can be a great addition to your resume and LinkedIn 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.imaglobal.org/pages/student-scholarships

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. 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 Chapter CMA Director Erin Pirro at erinpirro@hotmail.com for guidance 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 mastery of critical accounting and financial management skills. The difference in median total compensation between CMAs and non-CMAs is $29,000, or 58% higher median total compensation.* Visit IMA Website for more information to get started.

To Become a CMA
- Pay IMA Membership Fee and CMA Entrance Fee
- Obtain a bachelor's degree from an accredited institution or equivalent
- Complete Part 1: Financial Planning, Performance, and Analytics
- Complete Part 2: Strategic Financial Management
- Fulfill two continuous years of professional experience

To Sit for the CMA
- You do not need a bachelor's degree to sit for the exam
- Your degree does not need to be in Accounting or Finance
- You have three years to pass both parts
- Exams are offered in Jan-Feb, May-Jun, and Sep-Oct

Maintaining the CMA Credential
- Complete 30 hours of CPE annually, including 2 hours of ethics
- Pay the IMA membership and CMA maintenance fees

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 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.

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