

Ohio Regional Council News January, 2013

www.ohioima.org



Ohio
Regional
Council

Ohio Regional Council Meeting – Teleconference

Thursday, January 24- 5:15 p.m.

Dial in: 800-261-3225

Conference code: 2728906



Chair's Corner

The start of 2013 brings many changes with it. Between the fiscal cliff issue, year-end, and the start of the tax season, I'm sure we're all very busy right now. However, you won't want to miss the best IMA CPE event of the year.

The annual Meonake Conference at Kent State University is coming up fast. April 26 will be here before you know it, so be sure to get that day blocked out on your work calendar and watch the ORC website (www.ohioima.org) for details about registration. The Meonske Conference and pre-conference workshop tend to sell out, so be sure to register early. Also, the early bids registration is starting for the IMA annual conference in New Orleans.

The ORC will be there as well, helping members network through our hospitality suite. Be sure to register early, and let us know if you'll be attending. We hope you'll come learn and celebrate with us at these events.

Regards,

Dana Whitted, CPA

Ohio Regional Council Chairman

In Remembrance of Tamra Emmett

Tamra Emmett, CPA, died at age 49 on December 9, 2012 after a long hard fight with stage IV lung cancer. Tamra is survived by her loving husband, Bob; daughters, Natalie, Rachel and Amanda Spurr; step-son, Bob Emmett; parents, Dave and Carol Bulgrin; brother, Mark (Sandra) Bulgrin; sisters, Laura (Steve) Yaros and Paula (Jim) Gareri.

Tamra joined IMA on May 1, 1989 and was president of the IMA Akron Chapter during the 2003-04 IMA year and led the chapter to a 14th place finish in the Stevenson Division competition. She had many innovations during her Presidential year, including bringing the return of the Fashion Show at the May meeting (Tamra participated as one of the models). Tamra was a creative advisor with CFS of Northeastern Ohio for many years, and more recently with GoJo Industries. Tamra was also an integral member of the Meonske Professional Development Conference planning committee, soliciting and supporting sponsors and selling 50/50 tickets and anything else we asked her to do. She was also a member of the Ohio Society of CPAs. Tamra was a major participant in IMA events and we will miss her deeply.

IMPORTANT NOTICE FOR CHAPTERS – PLEASE REVIEW

IMA Board Policies

Section B-100 Withdrawal of Charters:

IMA will begin deactivation procedures on a chapter/affiliate if it does not meet the Chapter/Affiliate Sustainability Criteria:

- Leadership: At a minimum a chapter/affiliate must have a President, Secretary, Treasurer, and Vice President of Membership
- Chapter/affiliate must maintain a minimum number of 20 members.
- Activities benefiting membership: Submission of yearly report showing activities
- Administrative Requirement – No compensation unless requirement fulfilled:
- Change of Officers Report
- Financial report
- Chapter Bylaws updated every five years

***We are asking each Chapter and Council to submit a copy of their Updated Bylaws to their Community Relations Associate no later than April 30, 2013.**



IMA's 94th Annual Conference & Exposition

June 22-26, 2013 in New Orleans, La.
Registration opens January 28, 2013!

Visit imaconference.org for more information.

Product Showcase

Later this month IMA will release its first Fraud specific product:
IMA Fraud Series: Detection & Prevention.

Watch for an upcoming e-mail announcement!

[Visit IMA Learning Center](#)

UPCOMING WEBINAR SCHEDULE



Leadership
Academy

IMA Webinar

Delegation Skills

Tuesday, February 19, 2013 at 1 p.m. - 2:30 p.m. ET

Presenter:



Pemberton Smith, CMA, CFM
Wild West Regional Council Vice President
IMA Global Board of Directors

Event Description

This exciting workshop will explore the art of delegating effectively and identify the skills necessary to be a more effective manager in the accounting profession.

Price:
Free

CPE Credit:
1.5 Credits

Field of Study:
Personal Development

Research Area:
Business Performance
Management

Program Level:
Basic/Intermediate

Prerequisites:
Download Your
Participant Guide

Advance Preparation:
None

Instructional Method:
Group-Internet

IMA Webinar

IMA Research - Top Business Concerns Facing the Finance Organization in 2013

Wednesday, February 13, 2013 at 1 p.m. - 2:00 p.m. ET

Presenter:



Vishrut Parikh
Director, Product Marketing
NetSuite

Panelists:

Becky Correa, CPA, RVT
Director of Finance/Controller
San Francisco SPCA

Gary W. Bennett
Chief Financial Officer
Chief Administrative Officer
ASPYRA, LLC

Price:
Free

CPE Credit:
1.0 Credits

Field of Study:
Business Management
& Organization

Research Area:
Business Performance
Management

Program Level:
Basic

Prerequisites:
None

Advance Preparation:
None

Instructional Method:
Group-Internet

Event Description

Businesses today are operating in an increasingly complex, competitive environment. To cope with these business demands, organizations are increasingly calling on their accounting and finance teams to go beyond their traditional role of information suppliers and to provide analytical insight into the business.

In this webinar, you will learn the major findings from new IMA research that uncovers finance leaders' greatest business concerns and organizational challenges. A customer panel of finance executives will join IMA to share real-life insights into their top challenges and plans to overcome their obstacles in 2013.

MESSAGE FROM JEFF THOMSON, IMA CEO

_Happy New Year!!

To All IMA Members Around the Globe:

I just wanted to take a moment to wish you a Happy New Year and to thank you for your membership with IMA. We take your membership very seriously and will continue to strive to provide products, services and solutions that enable enriched careers and organizations.

Your association is growing and thriving in membership, CMAs, influence and respect around the world, and we aim to "raise the bar" in everything we do. You should expect nothing less as our "shareholders". As always, your candid feedback is critical and much appreciated.

I am "pumped" to begin a new year which promises great things for all of us.

Thanks,
Jeff

Created By: [Thomson, Jeffrey](#) On: Thu, Jan 03, 2013 01:52 PM

IMA Comments on Proposed Changes to IESBA Code of Ethics for Accountants

Montvale, N.J., December 18, 2012 – IMA®, one of the largest and most respected associations focused exclusively on advancing the [management accounting](#) profession, has released a [public comment letter](#) to The International Ethics Standards Board for Accountants (IESBA).

IMA's comment letter was written by its Committee on Ethics in response to IESBA's [request for comment](#) on its exposure draft: "Proposed Changes to the Code of Ethics for Professional Accountants Responding to a Suspected Illegal Act." IESBA's proposal describes the circumstances in which a professional accountant is required or expected to breach confidentiality in response to suspected illegal acts committed by a client or employer. To read IMA's full letter, visit: http://www.imanet.org/pdfs/IESBA_response_letter_12.13.12.pdf

Drawing from IMA's own [Statement of Ethical Professional Practice](#), key recommendations made by IMA's Committee on Ethics include:

- A mere suspicion is not enough of a basis to breach confidentiality – instead, the issue should be communicated externally only if it involves a clear violation of the law.
- There can be many instances of employees suspecting things that perhaps they don't have the background to fully understand, and to report this externally without it being a "clear violation of the law" would be irresponsible and could potentially unfairly damage the reputation of the organization and set the accountant up for unnecessary potential legal actions.
- Before breaching confidentiality, accountants should seek professional legal assistance to determine the best course of action, as different situations and jurisdictions may lead to varied recommended outcomes.

[Research Reveals Importance of Intuition in Workplace: How Are Your Powers of Perception?](#)

Task Force Finalizes Curriculum to Bridge the Accounting 'Skills Gap'

January 15, 2013

IMA/AAA MAS Task Force to reorient undergraduate and MBA accounting curricula to match on-the-job demands

Montvale, N.J., January 15, 2013 –

Two thought leaders in accounting education, [IMA®](#) (Institute of Management Accountants) and [AAA's](#) (American Accounting Association) Management Accounting Section (MAS), are working to bridge the gap between the skills currently provided in accounting education and those required in practice. Ultimately, these skills translate to greater business performance and shareholder protection.

The IMA-MAS Curriculum Task Force presented its initial recommendations on January 12 at the [2013 Management Accounting Section Research and Case Conference](#) in New Orleans, La. The presentation featured a transformational integrated accounting educational framework relevant to all accounting students.

“This achievement reflects IMA’s longstanding commitment to education reform and to addressing the talent shortage in management accounting,” said [Raef Lawson](#), Ph.D., [CMA®](#), CPA, IMA vice president of research, who serves as Task Force chair. “Accounting curricula must embrace how accountants today add organizational value in a variety of organizational settings, including content on strategy formulation and analysis, planning, and execution.”

The task force’s charge of developing a comprehensive integrated educational framework is responsive to recommendations made by the Pathways Commission, on which IMA has a representative. The Commission was formed in 2010 as a joint initiative between AAA and the American Institute of Certified Public Accountants to study the future of accounting education.

IMA’s research initiatives aimed at addressing the skills gap date back to 1986 with its contributions to the AAA’s Bedford Report, “[Future Accounting Education: Preparing for the Expanding Profession](#),” which examined accounting education and found a severe gap between what accounting educators teach and what organizations need from their accounting and financial staff.

To access Dr. Lawson’s presentation from the conference, visit: <http://bit.ly/XyruKt>.

About IMA® (Institute of Management Accountants)

[IMA®](#), the association of accountants and financial professionals in business, is one of the largest and most respected associations focused exclusively on advancing the [management accounting](#) profession. Globally, IMA supports the profession through research, the [CMA®](#) (Certified Management Accountant) program, [continuing education](#), networking, and advocacy of the highest [ethical business practices](#). IMA has a global network of more than 65,000 members in 120 countries and 200 local chapter communities. IMA provides localized services through its offices in Montvale, N.J., USA; Zurich, Switzerland; Dubai, UAE; and Beijing, China. For more information about IMA, please visit www.imanet.org.

Upcoming Chapter Events

Akron Chapter

<http://akron.imanet.org/>



Wednesday, February 20, 2013 – Past Presidents' Night

5:25 p.m.

Location: Tangier Restaurant

First Session:

Speaker: Barbara Weinschenk

Topic: Wills, Trusts and Probate – What You Should Know About Estate Planning

Second Session:

Speaker: Tiffany Herbert, CPA, ASA

Topic: Current Matters in Business Valuation

Wednesday, March 20, 2013 – Students' Night

5:25 p.m.

Location: Martin Center, University of Akron

First Session:

Speaker: Kristen Babbin, Heidi Hopkins, Jonelle Milchak – Corporate Ladder Search Partners

Topic: Resume Builders, Interviewing Skills, and the Job Market

Second Session:

Speaker: Maia Beatty

Topic: Three Secrets to Success for Accounting and Financial Services Professionals

Wednesday, April 17, 2013 – CMA/CFM Night

5:25 p.m.

Location: Tangier Restaurant

First Session:

Speaker: Raymond Dunkle, CPA – Forensic & Valuation Services, BCG & Company

Topic: Effective Implementation of an Anonymous Hotline

Second Session:

Speaker: Raj Aggarwal, Ph.D., CFA – University of Akron

Topic: The NEO Business Importance of the BRICs

For reservations at our Chapter meetings please e-mail [Reservations](#) or please call Jeff Falter @ [\(330\) 807-8800](tel:330-807-8800)

Pre-Tech Sessions are free

Canton Chapter

<http://canton.imanet.org/>

February 19, 2013

Pre-Dinner Technical Session (5:00 p.m.):

Interest Rate Strategies

Presented by **Joe Luckring and Edwin Martinez; PNC Bank**

After-Dinner Technical Session (7:15 p.m.):

Healthcare Issues for Business Professional

Presented by **Dr. Vishal Sawhney; Mercy Medical**

[click here to register](#)

March 19, 2013

Pre-Dinner Technical Session (5:00 p.m.):

Demographics for Civic Minded Citizen

Presented by **Fran Wells; Leasership Canton**

After-Dinner Technical Session (7:15 p.m.):

Benefits of Competitive Energy Markets and Customer Choice

Presented by **Carol Suderow; First Energy**

[click here to register](#)

April 16, 2013

Pre-Dinner Technical Session (5:00 p.m.):

Asset Protection Planning

Presented by **Brian Layman; Layman, D'Atri & Co.**

After-Dinner Technical Session (7:15 p.m.):

Optimizing the Financial Close

Presented by **Gabe Zubizarreta; SVA / Hylant Software**

[click here to register](#)

The meeting itself is free. Dinner is optional and costs \$28 for members/guests and \$15 for students.

Cincinnati North Chapter

<http://cincynorth.imanet.org/>

Spouse's Night

Wednesday, February 20, 2013

Crowne Plaza Cincinnati North Hotel

6:00 PM Dinner

7:00 PM *What's Your Personality*

Robin Throckmorton – Strategic HR, Inc.

Boss' Night

Wednesday, March 20, 2013

5:40 PM *Transformational Leadership*

Bryan Kaiser–Horizons AFTS

7:00 PM Dinner

8:00 PM *Hiring Trends and Skills Being Sought*

Deatra Terry - Rainmaker Resources LLC

Student/CMA Night

Wednesday, March 20, 2013

5:40 PM *CMA Exam Update*

Brian Hock, CMA, CIA–Hock International

7:00 PM Dinner

8:00 PM *The Big Picture*

Sandra Richtermeyer - Xavier University

Cost - \$25 (\$12 Student)

RSVP – Ted Hyle (tjhyle@yahoo.com) 513-560-0791

Crowne Plaza Cincinnati North

11320 Chester Road

Cincinnati (Sharonville), OH

513-771-2080

Cleveland Chapter

<http://cleveland.imanet.org/>

For upcoming events, please **RSVP** to Honey Wess by calling 216.496.8597 or email honey_wess@yahoo.com.

Cleveland East Chapter

<http://www.cleveast.imanet.org/>

Date	Speaker/Company	Topic
Tuesday February 19, 2013	Arthur Ward, CPA Card Palmer	"Tax Update"
Tuesday March 19, 2013	TBD	Plant Tour Horseshoe Casino Downtown - Cleveland, OH Joint meeting with IMA Cleveland Chapter
Tuesday April 23, 2013	TBD	Annual Student Night Event

Meeting Location	Agenda	Cost for Dinner and Meeting
Hilton Garden Inn 700 Beta Drive Mayfield Village, Ohio 44143 (440)229-9901 <i>*Unless Otherwise Noted*</i>	Networking and Sign-In 6:00 pm Dinner and Speaker 6:15 pm Adjournment 7:30 pm	Member \$25.00 Students \$10.00 Unless Otherwise Noted, Each Meeting is 1 CPE Credit

Columbus Chapter

<http://columbus.imanet.org/>

Dayton Chapter

<http://dayton.imanet.org/>

02/19/13 – Dinner Meeting – Student Night

Pre dinner

Speaker: Stephen Mott, Federal Bureau of Investigation
Topic: Information Security

After dinner

Speaker: Todd Dewett, PhD.
Topic: Show Your Ink – Understanding Authentic Leadership

03/19/13 – Dinner Meeting

Pre dinner

Speaker: Mike Schweller -Brady Ware & Company
Topic: Cost Segregation

After dinner

Speaker: Yvonne Dunphy
Topic: Discovering Five Rivers MetroParks

04/16/13 – Dinner Meeting

Pre dinner

Speaker: Tammy Bennett – Employers Resource Association
Topic: Best Practices for Hiring & Separation

After dinner

Speaker: Barb Hyde – The Entrepreneur Center
Topic: Incubation, It's Not for Chickens

Dinner meetings are held at the Mandalay Banquet Center

Pre-Dinner Sessions begin at 5:30 p.m.

Dinner starts at 6:30 p.m. with speaker after

Lima Chapter

<http://lima.imanet.org/>

Date: Tuesday, February 19, 2013

Location: Casa Lu Al
2323 N West St., Lima, OH

Pre-Meeting Session

Technical Meeting:

Topic:

Ohio Mid-Eastern Chapter

<http://pages.eohio.net/ima/>

Toledo Chapter

<http://toledo.imanet.org/>

IMA's 2012 Annual Report is available online
[click here.](#)



39th Annual Meonske Professional Development Conference
Ohio Council - Institute of Management Accountants
April 25 and 26, 2013
at
Kent State University

**Ohio Regional Council (ORC) Officers
2012 - 2013 Board of Directors Nominations**

Board Position	Name	Phone / Email	Chapter
Chairman	Dana Whitted	(216)-200-7715 DMHetrick@yahoo.com	Cleveland
Regional Director	Sandy Brenner	(216) 839-7288 sandra.brenner@basf.com	Cleveland East
Vice Chair - Administration/ Strategic Planning	Open		
Chair Elect	Open		
Auditor	Pat Smith	smitax@aol.com	Columbus
Past Chair - Executive & Nominating	Honey Wess	(216) 496-8597 honey_wess@yahoo.com	Cleveland
Historian	Wayne Maurer	(937) 327-7909 wmaurer@wittenberg.edu	Dayton
Secretary	Rob Thompson	(216) 406-4252 rthompson1299@gmail.com	Cleveland
Treasurer	Ginny Barker	gbarker1129@yahoo.com	Dayton
Director - Meetings & Chapter Services	Todd Daughenbaugh	(614) 849-1022 tdaughenbaugh@columbuslibrary.org	Columbus
Director of Annual Conference	Honey Wess	(216) 496-8597 honey_wess@yahoo.com	Cleveland
Vice Chair - Professional Development & Education	Joe Kirchner	(513) 608-4399 jdkirch@fuse.net	Cincinnati North
Program Chair - KSU Conference	Norm Meonske	(330) 554-7211 nmeonske@kent.edu	Akron
Co-Chair Operations - KSU Conference	Nick Sucic	(330) 673-9511 nsucic@davey.com	Akron
Associate Director - KSU Conference Operations	Ken Bechtol	(330) 673-9511 ext. 8272 ken.bechtoll@davey.com	Akron
Director - ICMA	Steve Law	(330) 384-5758 stevlawnj@hotmail.com	Akron
Director - Leadership Training	Open		
Director - Academic Relations	Kay Zekany	(419) 772-2074 kzekany@onu.edu	Lima
Director - Scholarships	Pam Matsko	(513) 706-9503 pmatsko@fuse.net	Cincinnati North

**Ohio Regional Council (ORC) Officers
2012 - 2013 Board of Directors Nominations**

Board Position	Name	Phone / Email	Chapter
IRS Panel Liaison - South	Paul Bendik	(937) 226-0070 pbendik@cshco.com	Dayton
IRS Panel Liaison - North	Perry Somerville	(330) 869-0115 sai@raex.com	Canton
Vice Chair - Membership/ Marketing & Public Relations			
Director - Information Technology	Carlos Chavez	(330) 723-0559 Cchavez58@aol.com	Cleveland East
Director - Awards	Stacey Stratis	ss131378@aol.com	Dayton
Vice Chair - Chapter Communications			
Editor - ORC Newsletter	Paul Myers	(937) 564-7964 Myersp70@gmail.com	Dayton
Council Appointed Chapter Representatives			
Council Appointed Representative - Akron	Jeffrey Falter	(330) 860-1144 jafalter@babcock.com	Akron
Council Appointed Representative - Canton	Laura Weisgarber	(330) 478-2810 weisgal@neo.rr.com	Canton
Council Appointed Representative - Cincinnati North	Pam Matsko	(513) 706-9503 pmatsko@fuse.net	Cincinnati North
Council Appointed Representative - Cleveland	Honey Wess	(216) 496-8597 honey_wess@yahoo.com	Cleveland
Council Appointed Representative - Cleveland East	Enrico Varricchio, Jr.	(216) 475-8787 emdvn@oh.rr.com	Cleveland East
Council Appointed Representative - Columbus	Alan Teich	(214) 529-3293 alanteich@yahoo.com	Columbus
Council Appointed Representative - Dayton	Stacy Finch	Stacy.finch25@yahoo.com	Dayton
Council Appointed Representative - Lima	Judith Clark	(419) 998-3262 jclark@unoh.edu	Lima
Council Appointed Representative - Ohio Mid Eastern	Benjamin H. Feutz	(330) 253-7068 benjamin.h.feutz@irs.gov	Ohio Mid Eastern
Council Appointed Representative - Toledo	Kathleen Fitzpatrick	(419) 530-3163 kgfitzpatrick@bex.net	Toledo