

# IMA NorthEast Regional Council

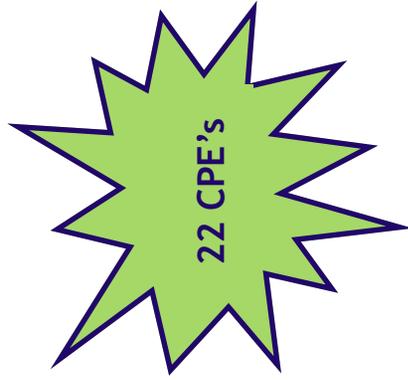


## 8th Annual Fall Conference

September 20-22, 2015  
Mystic Connecticut



22 Hours Continuing Professional Education Credits



Professional Development

The Association of  
Accountants and  
Financial Professionals  
in Business



NorthEast Regional Council

Linda M. Simmons  
42 Farm Brook Court  
Hamden, CT 06514



## **8th Annual Fall Conference**

Join us for another great conference starting with our

### **Sunday Evening CPE Session!**

*“Microsoft Office - Tips & Tricks”*

**Presented by: Pam Conway**

*September 20, 2015 7:15 PM-9:00 PM*

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## **Networking Reception**

### **Monday Evening**

Don't miss this great opportunity to Network with Conference attendees while enjoying beverages and hors d'oeuvres!

*September 21, 2015 7:30 PM-9:30 PM*

**Hosted by the IMA  
NorthEast Regional Council**

***“Our Commitment is Your Success”***

## **NEW THIS YEAR!**

### ***You Spoke, We Listened!***

Feedback from previous conference surveys told us that you would like more time for socializing and networking, so we have added the Roundtable Lunch and a Dinner Coordinator to enhance your conference experience. We hope you like it!

### ***Management Accounting Roundtable***

The Management Accounting Roundtable Lunch is an interactive and informal session that enables attendees to learn, exchange ideas, and network in a fun, relaxed environment. The event features a variety of professional topics for discussion, with a different topic at each table. Participants will lead and sustain their own discussion over a light/box lunch.

*Monday September 21, 2015 12:00-1:00 PM*

### ***Dinner Coordinator***

Dinner is on your own Sunday and Monday evening. Mystic and the surrounding area is full of great restaurants with many close to the Hilton Mystic. Our Coordinator will provide restaurant recommendations and reservations and will facilitate putting groups together for those who are interested in an expanded networking opportunity.

*Sunday September 20, 2015*

*Monday September 21, 2015*

## Sunday - September 20, 2015

- ◆ 3:30-5:00 PM COUNCIL MEETING
- ◆ 6:00-7:30 PM CONFERENCE REGISTRATION & CHECK-IN
- ◆ 7:15-9:00 PM *"Microsoft Office – Tips & Tricks"*  
**Pam Conway** 2.0 CPE

## Monday - September 21, 2015

- ◆ 7:00-7:45 AM BREAKFAST  
CONFERENCE REGISTRATION & CHECK-IN
- ◆ 7:45-9:00 AM *"Enterprise Performance Management (EPM)"*  
**Jeff Thomson** 1.5 CPE
- ◆ 9:00-10:15 AM *"Get Your Tech On! Technology Trends for Management Accountants"*  
**Brad Monterio** 1.5 CPE
- ◆ 10:15-10:45 AM BREAK
- ◆ 10:45-12:00 PM *"Fiduciary Duty 101 for the Non-Profit Board"*  
**Leah Cohen Chatinover** 1.5 CPE
- ◆ 12:00-1:00 PM LUNCH *"Management Accounting Roundtables"*  
**Small group discussions** 1.0 CPE
- ◆ 1:00-1:15 PM BREAK
- ◆ 1:15-2:30 PM *"A Practical Approach to Implementing the COSO—Internal Control Integrated Framework"*  
**Sandra Richtermeyer** 1.5 CPE
- ◆ 2:30-3:45 PM *"Using Improv Comedy to Improve Listening Skills"*  
**Melanie Szlucha** 1.5 CPE
- ◆ 3:45-4:00 PM BREAK
- ◆ 4:00-5:45 PM *"Ethics — It's Your Choice"*  
**Peter Olson** 2.0 CPE
- ◆ 6:00-7:30 PM *Dinner on your own*
- ◆ 7:30-9:30 PM **"Networking Reception"**

# CONFERENCE AT A GLANCE

## General Education Sessions

## Tuesday - September 22, 2015

- ◆ 6:40-7:00AM BREAKFAST  
CONFERENCE REGISTRATION & CHECK-IN
- ◆ 7:00-8:15 AM *"The Cost of Keeping Too Much Information"*  
**Mary Beth Davidson** 1.5 CPE
- ◆ 8:15-9:30 AM *"Lean Accounting and Accounting for Lean — Do You Know the Difference?"*  
**Mark DeLuzio** 1.5 CPE
- ◆ 9:30-10:00 AM BREAK
- ◆ 10:00-11:15 AM *"What's Up (or Down) in Healthcare Reform?"*  
**Ann Chiodini** 1.5 CPE
- ◆ 11:15-1:00 PM LUNCH - CPE session  
*"The Sales Tax Man (or Woman) Cometh!"*  
**Inez Mello** 2.0 CPE
- ◆ 1:00-1:15 PM BREAK
- ◆ 1:15-2:30 PM *"Simplify to Innovate!"*  
**Lisa Dalesandro DiChristofer** 1.5 CPE
- ◆ 2:30-2:45 PM BREAK
- ◆ 2:45-4:00 PM *"Leadership in the Trenches"*  
**Chandler Howard** 1.5 CPE

Please visit our website at [www.nerc.imanet.org](http://www.nerc.imanet.org) for conference updates.

## **Leah Cohen Chatinover**

### **"Fiduciary Duty 101 for the Non-Profit Board"**

Leah Cohen Chatinover is of counsel with the law firm of Stanger & Arnold, LLP in West Hartford, CT. Ms. Chatinover is a business lawyer for nonprofits. She provides general counsel services to tax-exempt organizations of all types, including health care, social services, educational, cultural, religious and community organizations, corporate, family and community foundations, trade associations, and other tax exempt entities. She advises tax exempt organizations in the areas of corporate governance; obtaining and maintaining tax exemption, mergers and other affiliations; federal and state taxation; and directors and officers liability and fiduciary obligations. Ms. Chatinover speaks regularly to professional and industry groups and volunteer boards of directors about issues facing non-profit organizations. Leah is also experienced advising business clients regarding formation, operation and closing down businesses. Ms. Chatinover is committed to serving as "outsourced general counsel" and trusted advisor to businesses and consultants. She earned her B.A. degree from Barnard College, and her J.D. degree from Yale Law School. She received a Mediation Certificate from the Quinnipiac Law School Center on dispute resolution. Ms. Chatinover is a member of the American Bar Association, the vice-chair of the ABA's Religious Organizations Subsection of the Nonprofit Organizations Section, and the Connecticut Bar Association. She is admitted in Connecticut and Massachusetts.

## **Ann B. Chiodini, MBA, CPA, CMA**

### **"What's Up (or Down) in Healthcare Reform?"**

Ann Chiodini is an independent consultant with over 21 years of experience offering business advisory, strategic planning, and interim CFO services to non-profit and health care clients. She is actively involved in the Rhode Island healthcare community at several levels and offers demonstrated leadership in financial administration and reporting, project implementation, benchmarking/modeling, and grant management. Her work in the New England health insurance market spans a period of 26 years.

## **Pamela Conway**

### **"Microsoft Office - Tips & Tricks"**

Pamela Conway has nearly 20 years of experience in the technical education field. A graduate of Purdue University, Pamela joined CompuWorks in 1991 as a technical writer and software trainer. After many years providing traditional classroom training and curriculum development, in 2000 she became part of CompuWorks' management team concentrating on implementing new training modalities and planning training/support projects for Fortune 500 companies and government agencies. Pamela has lectured throughout the United States and Europe.

## **Lisa Dalesandro DiChristofer**

### **"Simplify to Innovate!"**

As the Vice President for SAP's Regulated Industries Value Engineering practice, Lisa is responsible for driving thought leadership, solution innovation and value assessments across the Federal, Aerospace, Defense, State and Local Government, Higher Education, Healthcare and Energy & Utilities Industries. Lisa is a highly effective leader with over 20 years of experience in developing and implementing improvement strategies for technology and business process innovation.

## **Mary Beth Davidson**

### **"The Cost of Keeping Too Much Information"**

From 2003 through current, Mary Beth Davidson has been a Director of Records & Information Management for Travelers. Mary Beth joined the Records group after 20 years in the Corporate Audit department of Travelers. During her time in Audit she was responsible for both financial and information systems audits in a variety of Travelers' business lines including health, life, personal, and commercial. This background has helped Mary Beth in understanding the records and systems of the Company. Mary Beth currently dedicates most of her time working with IT on e-records projects and is part of a larger records team based in St Paul, MN. Mary Beth has a Bachelors in Business Administration from University of Massachusetts (1981) and an MBA from Western New England College (1997).

## **Mark C. DeLuzio, CMA, CPIM**

### **"Lean Accounting and Accounting for Lean - Do You Know the Difference?"**

Mark DeLuzio is founder and Chief Executive Officer of Lean Horizons Consulting, LLC ([www.leanhorizons.com](http://www.leanhorizons.com)). He is a former corporate officer and Vice President of Danaher Business Systems (DBS) for Danaher Corporation (NYSE: DHR), where he led the development and deployment of DBS on a global basis. Mark was selected by Danaher to be on the first study mission to Japan, studying and working at Toyota Motors and its suppliers. Mark is credited with developing the first Lean Accounting process in the United States for Danaher's Jake Brake Division. Mr. DeLuzio currently serves as a member of Central Connecticut State University's advisory board for its School of Business and in 2007 was inducted as a Life Member of the Shingo Prize Academy for his lifetime contribution to "Excellence in Manufacturing". Effective April 1, 2008, Mr. DeLuzio was elected to the board of directors of Hillenbrand, Inc. (NYSE: HI), which is a diversified industrial manufacturer. Mr. DeLuzio has consulted on a global basis, and is a frequent speaker at higher educational institutions. Mr. DeLuzio holds two undergraduate degrees in business (Marketing and Accounting), an MBA in Operations Management, a Certificate in Production and Inventory Management (CPIM) and is Certified Management Accountant (CMA). Mark is a member of the IMA Hartford Chapter.

# SPEAKERS

## **Chandler J. Howard** "Leadership in the Trenches"

Mr. Chandler J. Howard has been CEO and President of Liberty Bank (Middletown, CT) since 2007. He also held E-suite positions at Bank of America, First City Fund Corporation and Fleet. He is active in community affairs, currently serving as Director of the Travelers Championship, Middlesex Hospital, Vantis Life Insurance Company, Middlesex County Chamber of Commerce, Connecticut Bankers Association, and Goodspeed Opera House. He has been a member of the American Bankers Association Government Relations Committee and a Member of the Community Depository Institutions Advisory Council at The Federal Reserve System since 2014. He served as the President, CEO and Director of Connecticut Innovations, Inc. Mr. Howard also served as the Grand Marshall, 2013 Connecticut Veterans Parade and has a long association with the Greater Hartford Urban League, serving on the Advisory Board, and was chairman of their 40th Anniversary Celebration. He holds a BA Degree from the University of Connecticut and a Master's Degree in Finance from Rensselaer (RPI).

## **Inez M. Mello** "The Sales Tax Man (or Woman) Cometh!"

Inez M. Mello, MBA has over 25 years of state and local tax experience. A seasoned tax professional, Inez's areas of expertise include all facets of multi-state and local tax planning and compliance. Ms. Mello's wide breadth of state and local tax knowledge is reflected in the numerous seminars and education symposiums that she leads for associations including CPE, Inc., Lorman Education Services and the Massachusetts Society of CPA's. Ms. Mello is the Chair of the Massachusetts Society of CPA's State Taxation Committee and serves on the Rhode Island Society of CPA's State Taxation Committee. Ms. Mello served on CCH's National State Tax Advisory Board. Ms. Mello has continued her scholastic pursuits, serving as an adjunct professor for Bryant University and Johnson & Wales University. Ms. Mello is Bryant University's Graduate Multi-State Tax Professor. Ms. Mello is extremely well-known throughout the business community and was recognized by the U.S. Small Business Administration as the Rhode Island Women in Business Champion of the Year in 2007. Prior to becoming a multi-state tax consultant, Ms. Mello has served in various Director Roles for several CPA firms throughout New England. In this capacity, she helped establish and grow their state and local tax practices as well as oversaw all multi-state and local tax issues. Inez is an active member of the Institute of Management Accountants and is the President of the Providence, Rhode Island Chapter.

## **Brad J. Monterio** "Get Your Tech On! Technology Trends for Management Accountants"

Brad Monterio is Managing Director of Colcomgroup, Inc., a consulting/marketing services firm based in New York. He advises organizations on growing market share, developing new revenue streams, driving market adoption, and sourcing strategic partners. Brad counsels clients in financial services/technology, corporate disclosure, XBRL, ESG/integrated/sustainability/ CSR reporting, data analytics, and accountancy sectors. Brad regularly speaks/writes on transparency, integrated reporting, XBRL, ESG/ sustainability, marketing and communications issues and is an award-winning artist and product designer. Along with Kofi Annan, Robert Zoellick and Duncan Niederauer, he is a co-author of "Trust Meltdown: The Financial Industry Needs a Fundamental Restart." He also co-authored "Bringing Order to the Chaos: Integrating Sustainability Reporting Frameworks and Financial Reporting into One Report with XBRL" for Harvard Business School's eBook, "The Landscape of Integrated Reporting." Brad is Ivy-educated, receiving his Bachelor's Degree from Dartmouth College in 1988. Additionally, he has volunteered for many roles, including: Global Board Member, Institute of Management Accountants; Chair, IMA Technology Solutions and Practices Committee; Global Board Member of the Casualty Actuarial Society; Member of the Cornerstone Capital Group's Advisory Council and Direct member, XBRL International, Inc. (XII); Vice Chair, XII Best Practices Board (BPB); and member, Taxonomy Architecture Guidance and Implementation Guidance Task Forces. Brad is a member of the IMA New York Chapter.

## **Peter W. Olson, Ph.D.** "Ethics, It's Your Choice"

Dr. Peter W. Olson is the Senior VP of Business Development for Baldwin Research Institute, an educational program for people who are having problems with alcohol and drugs. We have helped people through our educational programs learn how to make better choices in their lives. Dr. Olson was a Senior Partner of CBI, LLC, a management consulting company dealing with Fortune 100 companies. He has earned his B.A. and M.B.A. degrees from Long Island University and his M.Ph. and Ph.D. degrees from Columbia University. He has held the following academic positions: Academic Dean of Branch Campuses at MSU, the Director of the "hybrid" online MBA Degree in Economic Crime and Fraud Management at Utica College, and the Program Chair of the M.Sc. degree program in International Management at RPI. Some of his previous academic appointments included: Long Island University, Central Connecticut State University, Southern Connecticut State University, Henley Management College (UK), and Kuwait University. His international business experience spans over 28 years in the global business environment with senior level executive management positions at Otis Elevator Company, United Technologies Corporation, Allied Bronze Corporation, and Women's Health International, Inc. He has been listed in *Who's Who in World*, *Who's Who in the America*, *Who's Who in Finance*, and *Who's Who in American Education*.

# SPEAKERS

## **Dr. Sandra B. Richtermeyer, CMA, CPA**

### **"A Practical Approach to Implementing the COSO - Internal Control Integrated Framework"**

Dr. Sandra Richtermeyer is Associate Dean of the Williams College of Business at Xavier University in Cincinnati, Ohio. She represents the Institute of Management Accountants on the COSO board. She works actively with a variety of professional organizations and is a frequent speaker on internal control, governance, technology enablement, and performance measurement. Her teaching and research interests are in the areas of corporate governance, accounting information systems, and nonprofit and governmental accounting. Her research interests include technology enablement and enterprise systems, non-profit accounting, and professional issues for accountants. She has authored many articles in academic and practitioner publications and has over 20 years of experience on boards as well as technology and accounting related advisory committees. In addition to her academic background, she worked as a CPA for many years in Denver, Colorado with a practice focus on compliance, assurance and systems implementation. Dr. Richtermeyer served as the Global Chair of IMA from 2010-2011. She is the 2013-2014 Ohio Accounting Educator of the Year and the 2011 American Women's Society of CPAs Educator of the Year. She is the 2013-2014 President of the American Accounting Association (AAA) Ohio Region and a Vice President on the board of the AAA Accounting Program Leaders Group and a member of the Ohio Society of CPAs board. Sandy is a member of the IMA Cincinnati North Chapter.

## **Melanie Szlucha**

### **"Using Improv Comedy to Improve Listening Skills"**

Throughout her life, Melanie Szlucha's heard "hey, you're pretty funny," but it wasn't until she became a founding member of the Stamford, CT-based improvisational comedy group World Class Indifference that she had the chance to put that to the test. Now 9 years later, and owner of her own business coaching job seekers, she integrates the communication, listening and mental flexibility aspects of improv into presentations to help professionals become better at listening and networking. Improvisational comedy is about far more than just being funny, it's about being in the moment and present, in order to react appropriately to what you're hearing going on around you. She has taught improv skills at Duke University and to hundreds of executives throughout the New York City area. Melanie is always developing her improv abilities through classes at the University of Massachusetts (including a class with the lead actors in the Sonic fast food commercials), and with CT Improv in Hartford, CT. She has an MBA from St. John Fisher College in Rochester, NY. Her company is Redinc, LLC.

## **Jeff Thomson, CMA, CAE**

### **"Enterprise Performance Management (EPM)"**

Jeffrey C. Thomson, CMA is president and CEO of IMA, one of the largest and most respected global associations focused exclusively on advancing the management accounting profession. He has been CEO since 2008. IMA has more than 65,000 members in 120 countries, with major regional offices and 200 local chapters around the world. In 2009, Mr. Thomson led IMA through a strategic turnaround which resulted in attracting more than 5,500 new IMA members (up nine percent) and nearly 12,000 new CMA (Certified Management Accountant) candidates (81 percent growth) in the face of a recession. Today, IMA is growing around the world in terms of respect, influence, membership, and CMAs in the face of intense competition and consolidation. IMA's financial health has been restored, resulting in many new value-adding member products and services. Prior to joining IMA, Mr. Thomson worked at AT&T for more than two decades where he served in various financial, strategic, and operational roles. In his last position at AT&T he served as the CFO for business sales, an \$18 billion revenue operation. An author of numerous trade articles, Mr. Thomson has conducted research and spoken globally on a variety of topics, including financial leadership, enterprise risk management, internal controls, IFRS, business performance management, strategic costing methods, lean accounting, strategic planning, and competitive analysis. Mr. Thomson was honored by Accounting Today by being included in the publication's annual "Top 100 Most Influential People List" in 2010 and 2012. He was also named by Trust Across America as one of the "Top 100 Thought Leaders in Trustworthy Business Behavior" in 2012 and 2013.

# LODGING AND DIRECTIONS

## LODGING

Hilton Mystic  
20 Coogan Boulevard  
Mystic CT 06355

Tel: 860.572.0731  
Web: HiltonMystic.com

### Register Early!

To reserve a room at conference rates, you can book online at HiltonMystic.com and use the Group Code **IMA**. You can also call the national reservations line at 800-HILTONS and use the same code.

Room Rates: \$139 for a Single or Double

All rates are per night plus local and state taxes.

Conference rates are in effect while rooms are available or until the cut-off date of **August 21, 2015**.

Reservations may be cancelled up to 72 hours prior to arrival without penalty. Reservations cancelled within 72 hours will be charged the first nights room rate. Please check with the Hilton Mystic.

## DIRECTIONS

### The Hilton Mystic is conveniently located off Interstate 95

From I-95 take Exit 90. At the end of the exit, follow signs to Mystic Aquarium. The Hilton Mystic is right across the street from the aquarium.

#### From Boston:

- Route 93 South to Route 128 North to Interstate 95 South to Exit 90 then follow above. Approximate time 1 hour 30 minutes

#### From Hartford:

- Route 2 East to Exit 28S (395 South) to Exit 78 Route 32 South (New London) to Interstate 95 North to Exit 90 then follow above. Approximate time 1 hour 10 min

#### From New Haven:

- Interstate 95 North to Exit 90 then follow above. Approximate time 1 hour

#### From Newark/Northern New Jersey:

- New Jersey Turnpike North to George Washington Bridge Interstate 95 North to Exit 90 then follow above. Approximate time 2 hours 30 minutes

#### From New York City:

- West Side Highway or FDR Expressway North to Interstate 95 North to Exit 90 then follow above. Approximate time 2 hours 15 minutes

# IMA NERC NEWS

The NorthEast Regional Council will hold its quarterly meeting on Sunday September 20 from 3:30 PM–5:00 PM. All members of the IMA are encouraged to attend. Non-members attending the conference are also invited to the meeting. Topics of discussions include a conference update, financial reports, upcoming events and the annual budget. This is a great opportunity to learn more about the council.

**Dinner on your own.**

**Check with our Dinner Coordinator for suggestions!**

## NorthEast Regional Council shirts!

### Wear it with Pride!

We have two styles - short sleeve polo and a long sleeve denim. Each style comes in Women's and Men's sizes from Small to 4XL. The polo shirt color is Pine (green) and the denim shirt is Indigo (blue). Color photos are available on our website. [www.nerc.imanet.org](http://www.nerc.imanet.org)

Shirts can be pre-ordered with your conference registration. They will also be available for sale at the conference. (sizes and styles may be limited)

The polo shirts are \$22 and the denim shirts are \$30





The Association of  
Accountants and  
Financial Professionals  
in Business

# REGISTRATION

IMA NERC FALL CONFERENCE REGISTRATION FORM			
Name:		Designation (s):	
Preferred First Name for Badge:			
Title:			
Company:			
Address:			
City, State, Zip:			
Telephone:			
E-Mail:			
IMA Member Number:		IMA Chapter:	
CPE's are electronically posted to IMA member accounts. Please be sure to include your IMA member number.			
Seminar Fees:	By	On/After	Full time Students
	7/31/2015	8/1/2015	With ID
Full Program	<input type="checkbox"/> \$269	<input type="checkbox"/> \$309	<input type="checkbox"/> \$150
Day One Only	<input type="checkbox"/> \$199	<input type="checkbox"/> \$239	<input type="checkbox"/> \$ 75
Day Two Only	<input type="checkbox"/> \$199	<input type="checkbox"/> \$239	<input type="checkbox"/> \$ 75
Additional information for planning purposes: <i>Please let us know in advance if you have dietary restrictions or food allergies.</i> Will be joining us on Sunday 09/20/15? (yes/no/not sure yet) 3:30-5:00 pm – Council Meeting _____ 7:15-9:00 pm – "Microsoft Office—Tips & Tricks" _____			
Conference Cancellation/Refund Policy: A refund will be issued if cancelled in writing by <b>September 6, 2015</b> . No refunds will be issued for cancellations after that date. IMA-NERC is only responsible for processing the Conference registration. IMA-NERC is not responsible for any travel or lodging expenses or out-of-pocket costs incurred. If for any reason you must cancel your Conference registration, please remember to cancel your hotel accommodations directly through the Hilton Mystic (860) 572-0731.			

PAYMENT INFORMATION			
CHECK—payable to IMA-NERC	CREDIT CARD - MasterCard	Visa	Discover
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Card Number _____			
Exp. Date _____		Security Code (back of card) _____	
Name as it appears on card (Please print) _____			
Authorized Signature _____			
Billing address of credit card: Address: _____ City, State, Zip: _____			
NERC Council Shirt Order: Please indicate size and quantity below: Polo Shirt: \$22.00 Men's Size _____ Women's Size _____ Denim Shirt: \$30.00 Men's Size _____ Women's Size _____			
<p><b>MAKE CHECKS PAYABLE TO IMA-NERC</b></p> <p>MAIL OR E-MAIL REGISTRATION FORM AND PAYMENT TO :</p> <p>IMA-NorthEast Regional Council c/o Linda M. Simmons 42 Farm Brook Court Hamden, CT 06514 Phone: 203 988-4903 e-Mail: Linda.Simmons@comcast.net</p> <p>Please check our website for conference updates <a href="http://www.nerc.imanet.org">www.nerc.imanet.org</a></p>			
Photo Release Form: I agree and acknowledge that IMA-NERC may take photographs and make a video at IMA-NERC's 8 <sup>th</sup> Annual Conference for reproduction in IMA-NERC educational, news, or promotional material, whether in print, electronic, or other media, including the IMA-NERC website. By participating in IMA-NERC's 8 <sup>th</sup> Annual Conference, I grant IMA-NERC the right to use my name and image for such purposes. _____ <i>please initial</i>			
Liability Waiver: I agree and acknowledge that I am undertaking participation in IMA-NERC events and activities as my own free and intentional act and I am fully aware that possible physical injury might occur to me as a result of my participation in these events. I give this acknowledgement freely and knowingly and that I am able to participate in IMA-NERC events and I do hereby assume responsibility for my own well-being. _____ <i>please initial</i>			