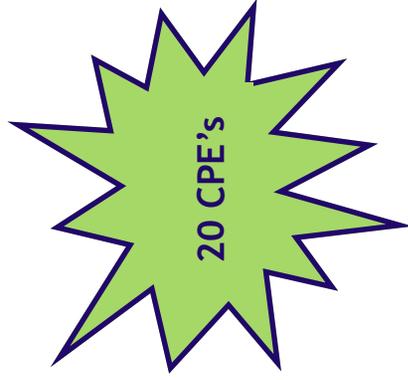


NorthEast Regional Council

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



Professional Development

IMA NorthEast Regional Council



9th Annual Fall Conference

September 18-20, 2016
Westford Massachusetts



20 Hours Continuing Professional Education Credits



9th Annual Fall Conference

Please join us for another great conference!
Westford Massachusetts September 18–20, 2016

NEW THIS YEAR

Based on feedback from previous conference surveys, we are trying a new format. There will be *half* days on Sunday and Tuesday and a *full* day on Monday while still offering 20 CPE's.

The conference will open with our first session on Sunday afternoon at **1:00 pm** and will close on Tuesday afternoon at **12:30 pm** with a drawing for a free registration to the Fall 2017 Conference.

We have three great sessions planned for Sunday afternoon including a presentation by our IMA Global Chair-Elect, Marc Palker. After the last session, there will be a light buffet dinner at 6:00 pm followed by the Council meeting at 7:30 pm. All conference participants are welcome!

Sunday Afternoon CPE Sessions! 1:00 PM—5:30 PM

“Gaming in Massachusetts - What’s Next”
Presented by: Enrique Zuniga

“Office 365 - Changing Apps for a Changing World”
Presented by: Pamela Conway

“When to Know the Line Has Been Crossed”
Presented by: Marc Palker, CMA

Management Accounting Roundtable

The Management Accounting Roundtable Lunch is back again this year. This 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 19, 2016 11:45 AM-1:00 PM

Dinner Coordinator

Dinner is on your own Monday evening and our Coordinator will be available to facilitate putting groups together for those interested in an expanded networking opportunity. Westford and the surrounding area is full of great restaurants with many close to the Westford Regency so there will be plenty of time to get back for the evening Network Reception.

Networking Reception Monday Evening

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

September 19, 2016 7:30 PM-9:30 PM

**Hosted by the IMA
NorthEast Regional Council**

“Our Commitment is Your Success”

CONFERENCE AT A GLANCE

Sunday - September 18, 2016

- ◆ 12:00-1:00 PM CONFERENCE REGISTRATION & CHECK-IN
- ◆ 1:00-2:15 PM *"Gaming in Massachusetts - What's Next"*
Enrique Zuniga 1.5 CPE
- ◆ 2:15-3:30 PM *"Office 365 - Changing Apps for a Changing World"*
Pamela Conway 1.5 CPE
- ◆ 3:30-4:15 PM BREAK
- ◆ 4:15-5:30 PM *"When to Know the Line Has Been Crossed"*
Marc Palker, CMA 1.5 CPE
- ◆ 6:00-7:30 PM BUFFET DINNER
- ◆ 7:30-9:00 PM **COUNCIL MEETING**

Monday - September 19, 2016

- ◆ 7:00-7:30 AM BREAKFAST
CONFERENCE REGISTRATION & CHECK-IN
- ◆ 7:30-8:45 AM *"What Every Non-Profit Board Member Needs to Know"*
David Doyon, CPA 1.5 CPE
- ◆ 8:45-10:00 AM *"Ready, Set, Go: The New Revenue Recognition Rules"*
Jessie Kanter, CPA 1.5 CPE
- ◆ 10:00-10:20 AM BREAK
- ◆ 10:20-11:35 AM *"Get Your Tech On! Technology Trends for Management Accountants"*
Brad Monterio 1.5 CPE
- ◆ 11:45-1:00 PM LUNCH *"Management Accounting Roundtables"*
Small group discussions 1.5 CPE

Monday - September 19, 2016 (continued)

- ◆ 1:00-1:10 PM BREAK
- ◆ 1:10-2:25 PM *"Have Leases? What You Need to Know About the New Lease Standard"*
Susan Cosper 1.5 CPE
- ◆ 2:25-3:40 PM *"The Dark Side of Patents: Perspectives From a Victim of Abusive Patent Litigation"*
Michael Skelps 1.5 CPE
- ◆ 3:40-4:00 PM BREAK
- ◆ 4:00-5:15 PM *"Surviving and Thriving - When Conversations Become Crucial"*
Hamish Blackman & Adam Sutton 1.5 CPE
- ◆ 5:30-7:30 PM *Dinner on your own*
- ◆ 7:30-9:30 PM **NETWORKING RECEPTION**

Tuesday - September 20, 2016

- ◆ 7:15-7:45 AM BREAKFAST
CONFERENCE REGISTRATION & CHECK-IN
- ◆ 7:45-9:00 AM *"Alternative Debt Financing"*
Michael Saul 1.5 CPE
- ◆ 9:00-10:40 AM *"ETHICS: Blinded by Pressure"*
Peter Olson, PhD 2.0 CPE
- ◆ 10:40-11:00 AM BREAK
- ◆ 11:00-12:15 PM *"Does your 'SOX' Fit?"*
Jonathan Fink, CPA 1.5 CPE
- ◆ 12:15-12:30 PM **CLOSING**

Please visit our website for conference updates
www.nerc.imanet.org

Hamish Blackman

"Surviving and Thriving – When Conversations Become Crucial"

Hamish's career extends for more than 30 years focusing on advising organizations on factors impacting productivity, morale, and work dynamics. As a trained mediator and frequent industry speaker, Hamish has brought his deep expertise to the corporate sector as well as to departments and programs at dozens of colleges and universities across the US. Hamish has developed and delivered a vast array of programming and tools that address transformational change management, responding to loss, a drug free workplace, violence prevention, mergers, takeovers and transitions, constructive confrontation and growing leaders and managers. Prior to joining Breakthrough Collaboration, Hamish served in many positions, including as President of The Wellness Corporation.

Pamela Conway

"Office 365 – Changing Apps for a Changing World"

Pamela Conway has over 20 years of experience in the technical education field. A graduate of Purdue University, Pamela joined the training company, 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' ownership team concentrating on implementing new training modalities and planning training/support projects for Fortune 500 companies and government agencies. In August of 2015, CompuWorks was sold to New Horizons. Pamela now serves as Senior Instructional Design and Content Manager in the innovative and newly-formed Content Solutions Group at New Horizons. Pamela has lectured throughout the United States and Europe.

Susan M. Cospers

"Have Leases? What You Need to Know About the New Lease Standard"

Susan M. Cospers is the FASB technical director and Chairman of the Emerging Issues Task Force, a role she has held since February 1, 2011. Ms. Cospers has responsibility for managing the FASB's technical projects and activities. Ms. Cospers has more than 23 years of diverse financial reporting and auditing experience. Prior to her appointment at the FASB, she was a partner with PricewaterhouseCoopers LLP (PwC). Ms. Cospers joined the Pittsburgh office of PricewaterhouseCoopers in 1992, where she performed audits of private and public companies in PwC's Assurance practice. From 1998 to 2001, she accepted an international assignment in the Firm's London office. There, she led global audit engagements and advised clients on international accounting issues. After her return to Pittsburgh, in 2005 she was selected for a three-year fellowship with the FASB, where she held the roles of practice fellow and senior practice fellow. Upon completing the fellowship, she became part of PwC's national office and, served in PwC's Financial

Instruments, Structured Products, and Real Estate Group in New York City. She earned her B.S. in accounting from Indiana University of Pennsylvania and is a certified public accountant in the states of New York, New Jersey, and Pennsylvania.

David Doyon, CPA

"What Every Non-Profit Board Member Needs to Know"

David has over 20 years of experience in the fields of financial, managerial, and international accounting. He has worked in public accounting and has performed audits on for profit and non-profit entities, and prepared financial statements and tax returns for these clients, as well. David has also worked in the industry as a controller and as a consultant in the areas of financial accounting/management, cash flow management, consolidation accounting and international financial reporting standards. He is also a member of the faculty of Southern New Hampshire University. A native of Maine, David received his bachelor's degree in accounting in 1990 from the University of Southern Maine. In 1997, he received his MBA from Southern New Hampshire University and is a licensed CPA. He is a member of the IMA, Southern New Hampshire Chapter.

Jonathan H. Fink, CPA

"Does Your "SOX" Fit?"

Jonathan H. Fink, is a CPA and lead partner in BlumShapiro's Healthcare Services Group and has significant experience with providing audit, accounting and consulting services to a variety of healthcare organizations. In addition, he serves other non-profit organizations, including education clients. As part of BlumShapiro's Process and Controls Consulting Group, Jonathan provides services such as Sarbanes-Oxley compliance, internal control documentation and evaluation, corporate compliance and business risk assessments. Jonathan previously worked at Arthur Andersen LLP prior to joining BlumShapiro. He obtained his BS in Accounting at the University of Connecticut, where he also serves on the Accounting Department advisory board. He is a member of the AICPA, CTCPA and the IIA. He is affiliated with many other organizations, amongst others, the Association for Long-Term Care Financial Managers, LeadingAge CT and MA, CT Association of Health Care Facilities, Watkinson School, the Children's Law Center of CT, Hebrew Health Care, and Camp Courant.

Jessie T. Kanter, CPA

"Ready, Set, Go: The New Revenue Recognition Rules"

Jessie T. Kanter, is a CPA and a director in BlumShapiro's Accounting and Auditing Department based in Providence, RI, and brings 15 years of public accounting experience. Jessie has provided audit services to a variety of clients, including manufacturers, distributors, construction companies, investment firms, biotech

SPEAKERS

companies, professional service firms and non-profit organizations. Her focus is in quality control of financial statement audits in which she provides consulting on complex technical accounting matters and internal support and review for the firm. Jessie worked at Kahn, Litwin, Renza & Co., CBIZ Tofias and PriceWaterhouseCoopers prior to joining BlumShapiro in 2013. She obtained her BS in Accounting from Husson University and is affiliated with the AICPA and the RISCPA. She is Treasurer of Project Undercover, Inc. and is on the Board of the Family Literacy Center of Lincoln, RI

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 in financial services/technology, corporate disclosure, XBRL, ESG/integrated/sustainability/ CSR reporting, data analytics, and accountancy sectors. Brad regularly speaks/writes/blogs on these issues. Brad has co-authored with Kofi Annan (former UN Secretary General), Robert Zoellick (former President of the World Bank) and Duncan Niederauer (former CEO of NYSE) the "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 "The Landscape of Integrated Reporting." Brad is Ivy-educated, receiving his Bachelor's Degree from Dartmouth College in 1988. Brad is a member of the IMA New York Chapter, as well as an IMA Global Board Member where he serves as Vice Chair of the IMA Technology Solutions and Practices Committee. Brad holds several other volunteer positions, to name a few, he is; a Global Board Member of the Casualty Actuarial Society (CAS); a member of the CAS Innovation Council and the CAS Institute Advisory Board; a member of the KKS Advisors Expert Advisor Network for strategy and reporting consulting; and Direct member, XBRL International, Inc. (XII); Vice Chair, XII Best Practices Board (BPB).

Peter W. Olson, Ph.D. **"ETHICS: Blinded by Pressure"**

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. Prior to this position, 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 MPh. and PhD. 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 MSc. degree program in International Management at RPI. Some of his previous academic appointments included: Long Island University, Cen-

tral 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*.

Marc P. Palker, CMA **"When to Know the Line Has Been Crossed"**

Marc P. Palker, CMA, has more than 30 years of experience in senior financial management positions with small and midsize public and private companies. He is a principal at MPP Associates, Inc., where he serves public, private, and not-for-profit corporations as a part-time or interim CFO. Currently he is serving numerous companies on Long Island, N.Y. Earlier in his career, he worked as managing director of the Finance and Accounting Practice Group of Madison Davis Professional Services (MDPS), LLC, which he joined by combining his consulting practice with MDPS in 2004. He holds a B.S. in Accounting from Rider University and an M.B.A. in Finance from St. John's University. Mr. Palker has been an active IMA member for 40 years, he previously served as a member of IMA's Global Board of Directors, on IMA's Small Business Financial and Regulatory Affairs Committee, and as president of the IMA Long Island Chapter Board of Directors. Additionally, he is Chair-Elect of IMA's Global Board of Directors for the 2015-2016 fiscal year and also serves as chair of IMA's Planning and Development Committee and chair of the Nominating Committee.

Michael Saul **"Alternative Debt Financing"**

Mike Saul is a seasoned banking, business and economic development professional with strong leadership, business development, critical relationship building and strategic planning skills. Mike has experience building sales, business development and management teams in start-ups, challenged and multi-function organizations. Mike was recently a Senior Relationship Manager at Santander Bank and he prides himself on "sharing his diverse experience with clients and prospects to find solutions beyond just capital and winning their trust and business". Mike had a distinguished career with Bank of Boston serving as a senior credit officer of a diverse multibillion dollar loan portfolio and as a lending executive of several specialized divisions where significant improvements in profitability, improved operating models, new products and technology solutions were achieved. Mike has also led the successful turnaround of a privately held company by repositioning the business in new growth sectors and implementing a top to bottom overhaul of sales, administrative and operations including being the first ISO certified company in its industry. In the community Mike served on many non-profit boards in leadership roles.

SPEAKERS

Some of which included Trustee and Development Committee Chair of the Providence Performing Arts Center with a leadership role in a \$6.7 million Capital Campaign to renovate and expand PPAC's theater; Founder, Board Member and Chair of the strategic planning committee of Minority Investment Development Corporation; Founder, Board Member and Executive Director of The Urban revitalization Fund and Founder, Consultant and Advisory Board Member of Tech Sand Box.

Michael Skelps **"The Dark Side of Patents: Perspectives from a Victim of Abusive Patent Litigation"**

Michael Skelps is the General Manager of Capstone Photography in Middlefield CT. His team comprises 500 contract photographers across the country, serving more than 2,000 endurance sporting events, such as 5K road races, triathlons and marathons. Michael and his company faced and overcame abusive patent litigation in 2013-2014 in a case that drew international attention within the photography business. After this ordeal, Michael joined forces with several groups seeking patent reform in Congress, including Consumer Electronics Association, United for Patent Reform, Connecticut Veterans Chamber of Commerce and Application Developers Alliance. In 2015, he became a spokesperson for these groups, meeting with the offices of more than seventy congressmen and senators to advocate meaningful patent reform legislation. Michael started his career as a nuclear engineer in the US Navy from 1990-1995. He then worked as a Senior Manager at United Technologies where he led several global e-Business initiatives for Otis Elevator Company and UTC Fire & Security. In 2005, he founded Capstone Photography. He earned a Bachelor of Science in Aerospace Engineering from the University of Virginia in 1990. He earned his MBA in 1997 from the Darden Graduate School of Business, also at the University of Virginia. In 2015, Michael was inducted into the Connecticut Veterans Hall of Fame for his continuing community service and leadership since his arrival in Connecticut in 2000.

Adam Sutton **"Surviving and Thriving - When Conversations Become Crucial"**

Adam is a dynamic, inspirational speaker, sought-after coach and corporate trainer and a thought leader in the fields of positive psychology and human development. During his 20-year career he has worked extensively in a variety of settings and for a number of different organizations in the not-for-profit and for-profit arena. His passion is for helping individuals and organizations become their very best by bringing a down-to-earth, real-time and real-life approach to topics ranging from employee engagement to effective communication to emotionally-intelligent management. Prior to joining Breakthrough Collaboration, Adam worked as a trainer, program manager and organization development consultant at Harvard University, partnering with hundreds of staff at all levels. His work included managing the

open-enrollment professional development courses, designing and delivering many of the most popular workshops on interpersonal communication and relational skills, and the creation and leading of on-going organizational development initiatives - including the rewards and recognition, performance management, employee engagement and new employee orientation programs.

Enrique Zuniga **"Gaming in Massachusetts - What's Next"**

Enrique is a current member of the Massachusetts Gaming Commission. He recently served as the Executive Director of the Massachusetts Water Pollution Abatement Trust. The Trust is a \$5.2 billion state infrastructure bank that provides subsidized loans to Cities and Towns for clean water and drinking water projects. The Trust is a "State Revolving Fund" that accepts federal grants and issues municipal debt to fund the loans it provides to municipalities. Under his tenure the Trust re-procured all its advisors and service providers, issued a competitive short term financing of \$100 million, and prepared for the permanent financing of \$450 million of loans. Prior to joining the Trust, Enrique was the director of Quality Assurance at the Massachusetts School Building Authority. Enrique's duties cut across different areas of the Authority including the initial drafting of regulations, reimbursements to cities and towns during the design and construction project (progress payments), design and implementation of information systems, executive reporting, training and other special projects. Prior to the MSBA, Enrique was a manager at Ernst & Young in the Real Estate and Construction Advisory Services Group, where he conducted a number of advisory, audits and risk assessments for corporate clients with large capital programs. Enrique came to New England 17 years ago to obtain an MBA from the Yale School of Management, and prior to that he was a co-owner and director of a residential development and construction company in Monterrey Mexico. Enrique obtained a Civil Engineering degree in Mexico. In 1997 Enrique relocated to Massachusetts and since 2001 has resided in Jamaica Plain with his wife Ellen and two children.

LODGING AND DIRECTIONS

LODGING

Westford Regency Inn and Conference Center
219 Littleton Road
Westford, MA 01886
Tel: 978.692.8200
Web: WestfordRegency.com

Register Early!

To reserve a room at conference rates, please call the hotel and refer to NERC. It is important to specify our group name when making a reservation. Online registration will not provide the conference room rate.

Room Rates: \$115 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 **September 6, 2016**.

Reservations may be cancelled up to 72 hours prior to arrival without penalty. Reservations cancelled within 72 hours will be charged. Please check with the Westford Regency Inn and Conference Center.

DIRECTIONS

To the Westford Regency Inn and Conference Center

From the South:

- Take Route 495 N to exit 32 Boston Rd, toward Westford
- Merge onto Boston Rd towards MA-225 / Nashoba Valley Tech HS
- Take the 2nd right onto Littleton Rd / MA-110
- The hotel is about ½ mile on the right

From the North:

- Take Route 495 S to exit 32 Boston Rd, toward Westford
- Keep left to take the Boston Rd ramp towards MA-225 / Nashoba Valley Tech HS
- Turn left onto Boston Rd
- Turn right onto Littleton Rd / MA-110
- The hotel is about ½ mile on the right

IMA NERC NEWS

The NorthEast Regional Council will hold its quarterly meeting on Sunday September 18 from 7:30 PM–9:00 PM. All conference participants are encouraged to attend. 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. A light dinner will be served prior to the meeting.

Find us on  facebook.com/NorthEast.Regional.Council.IMA

 linkedin.com/groups/3306376

 linkup.imanet.org NorthEast Regional Council

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

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)

Polo shirts are \$22

Denim shirts are \$30





The Association of
Accountants and
Financial Professionals
in Business



Northeast
Regional
Council

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. Be sure to include your <i>IMA member</i> number.			
Conference Fee: Includes all sessions and meals except as noted	By 7/31/2016	On/After 8/1/2016	Full time Student with ID
	<input type="checkbox"/> \$269	<input type="checkbox"/> \$309	<input type="checkbox"/> \$150
Special Pricing: 10% discount if 2 people register from the same company 15% discount if 3 or more people register from the same company			
Important Notes: <i>Please let us know in advance if you have dietary restrictions or food allergies</i> For planning purposes will you be attending the following on Sunday September 18: 6:00-7:30 pm—Light Dinner (after the sessions) Yes No 7:30-9:00 pm—Council Meeting Yes No Are you interested in being a facilitator at the Roundtable lunch? Yes No			
Conference Cancellation/Refund Policy: A refund will be issued if cancelled in writing by September 6, 2016 . 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 Westford Regency Inn and Conference Center (978) 692-8200.			

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 <i>size</i> and <i>quantity</i> below: Polo Shirt: \$22.00 Men's Size _____ Women's Size _____ Denim Shirt: \$30.00 Men's Size _____ Women's Size _____			
<p>MAKE CHECKS PAYABLE TO IMA-NERC</p> <p>MAIL OR E-MAIL REGISTRATION FORM AND PAYMENT TO :</p> <p>IMA-NorthEast Regional Council c/o Linda 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 <u>www.nerc.imanet.org</u></p>			
Photo Release Form I agree and acknowledge that IMA-NERC may take photographs and make a video at IMA-NERC's 9 th 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 9 th 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>			