

20 CPE's

Professional Development

IMA NorthEast Regional Council



12th Annual Fall Conference

September 22-24, 2019
Hampton New Hampshire

REGISTER
EARLY AND
SAVE!!



20 Hours Continuing Professional Education Credits



The Association of
Accountants and
Financial Professionals
in Business

NORTHEAST REGIONAL COUNCIL

12th Annual Fall Conference

Please join us for another great event!!

Hampton New Hampshire September 22—24, 2019

Why Should You Attend?

This conference offers **20** CPE credits with **13** educational sessions covering key management accounting practice areas.

Hear from inspiring industry leaders on Accounting & Tax Updates, Data Analytics, Not-For-Profit Financing, White Collar Crime, Leadership, Cyber Hygiene, Purchasing, Diversity & Inclusion, Marketing, Ethics and more!

By attending the conference you will:

- ⇒ Enhance your technical skills
- ⇒ Learn the latest *Best Practices*
- ⇒ Gain insight from other management accountants
- ⇒ Further your professional development
- ⇒ Have fun!

The conference kicks off on Sunday afternoon with the Council Meeting at **1:15 pm**, followed by registration and check-in. The first session will begin at **4:15 pm** and the conference will close on Tuesday afternoon at **2:00 pm** with a drawing for a free registration to the IMA NorthEast Regional Council Fall 2020 Conference. Please see the **Conference at a Glance** section for the complete schedule of topics, speakers and times.

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

Thank you to our Sponsors!



The Association of
Accountants and
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NEW HAMPSHIRE CHAPTER



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HARTFORD CHAPTER



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BOSTON CHAPTER

CONFERENCE AT A GLANCE

Sunday - September 22, 2019

- ◆ 1:15-2:45 PM COUNCIL MEETING
- ◆ 3:00-4:05 PM CONFERENCE REGISTRATION & CHECK-IN
- ◆ 4:05-4:15 PM ANNOUNCEMENTS
- ◆ 4:15-5:30 PM *"Current Trends in Corporate Purchasing"*
Ginger White, CMA, CSCA 1.5 CPE
- ◆ 5:30-6:45 PM *"Diversity and Inclusion"*
Linda Devonish-Mills 1.5 CPE
CMA, CPA, CAE, MBA
- ◆ 7:00-8:00 PM BUFFET DINNER

Monday - September 23, 2019

- ◆ 7:00-7:30 AM BREAKFAST
CONFERENCE REGISTRATION & CHECK-IN
- ◆ 7:30-7:45 AM ANNOUNCEMENTS
- ◆ 7:45-9:00 AM *"Community Development Financial Institutions at the Crossroads"*
David Doyon, CPA 1.5 CPE
- ◆ 9:05-10:20 AM *"Emotional Intelligence"*
Anthony Kvedar, CMA 1.5 CPE
- ◆ 10:20-10:35 AM BREAK
- ◆ 10:35-11:50 AM *"Accounting Update 2019"*
Jeffrey Wheeler, CPA 1.5 CPE
Alan Duhaime, CPA
- ◆ 11:55-1:40 PM LUNCH - CPE session
"White Collar Crime"
John Keelan, SSA 1.5 CPE
- ◆ 1:40-1:50 PM BREAK
- ◆ 1:50-3:05 PM *"Promoting Good Cyber Hygiene"*
Jeffrey Ziplow, MBA, CISA, CGEIT 1.5 CPE

Monday - September 23, 2019 (continued)

- ◆ 3:10-4:25 PM *"Marketing to Millennials: You Have to Listen to Be Heard"*
Amanda Magee 1.5 CPE
- ◆ 4:25-4:40 PM BREAK
- ◆ 4:40-5:55 PM *"Tariff Wars - Business Impacts"*
Ned Gandevani, PhD, MBA 1.5 CPE
- ◆ 6:00-7:00 PM NETWORKING RECEPTION
- ◆ 7:00 PM *Dinner on your own*

Tuesday - September 24, 2019

- ◆ 7:15-7:45 AM BREAKFAST
CONFERENCE REGISTRATION & CHECK-IN
- ◆ 7:45-7:55 AM ANNOUNCEMENTS
- ◆ 7:55-9:10 AM *"Data Analytics and the Future of Accounting"*
Rod Koch, CMA, CSA, PMP, CSM 1.5 CPE
- ◆ 9:15-10:30 AM *"Corporate Tax Update 2019"*
Jeff Ring, CPA 1.5 CPE
- ◆ 10:30-10:40 AM BREAK
- ◆ 10:40-11:55 PM *"Leadership in Action: Stepping Out of Your Comfort Zone"*
Tamara Morytko 1.5 CPE
- ◆ 12:00-2:00 PM LUNCH - CPE session
"Theranos: A Case Study in Business Ethics"
Kiki Berk, PhD 2.0 CPE
Joshua Tepley, PhD
- ◆ 2:00-2:15 PM CLOSING (*Drawing for free conference!*)

SPEAKERS

Kiki Berk, PhD

"Theranos: A Case Study in Business Ethics"

Dr. Kiki Berk is an Assistant Professor of Philosophy at Southern New Hampshire University and currently holds the position of Papoutsy Chair in Ethics. She received her Ph.D. in Philosophy from the VU University Amsterdam in 2010. Her current research interests include value theory (especially happiness), analytic existentialism (especially the meaning of life), and the philosophy of death (especially immortality).

Linda Devonish-Mills, CMA, CPA, CAE, MBA

"Diversity and Inclusion"

Linda Devonish-Mills has held various, rewarding positions in the management accounting profession. Since, May 1, 2006, she has been with the Institute of Management Accountants (IMA) in various leadership roles. Linda is currently in the role at IMA as Director, Diversity and Inclusion. Prior to working at IMA, Linda worked at the American Institute of Certified Public Accountants (AICPA) in the role of Senior Technical Manager. In that role, Linda developed material for the Uniform CPA Examination. She also held leadership positions at Time Warner Inc. and Ernst & Young. Linda serves as Vice President for the Alumni Board of Governors at Fairleigh Dickinson University.

David Doyon, CPA

"Community Development Financial Institutions at the Crossroads"

David Doyon has spent his career in a variety of industries. The early part of his career was spent in public accounting, working with various types of corporate clients. After leaving public accounting, he spent his time in the private sector working with an engineering firm and a building materials company and is currently a professor of accounting at Southern New Hampshire University (SNHU) where his specialties are consolidation accounting, international accounting and accounting certification prep course. He is also the CFO of ROC USA, which is an affordable housing nonprofit that specializes in preserving affordable housing for low income individuals. Doyon received his Bachelor of Science in Accounting from the University of Southern Maine and his Master in Business Administration from SNHU. He is a licensed CPA and a member of the IMA New Hampshire Chapter.

Alan Duhaime, CPA

"Accounting Update 2019"

Alan is a principal at Baker Newman Noyes, specializing in providing audit and accounting, mergers and acquisitions, internal controls, corporate finance, and public and regulatory filing services to clients in the manufacturing, high-technology, construction, and real estate industries. Additionally, Alan provides leadership to the firm through his responsibilities including office matters related to practice development, training, and recruiting. He has been with the firm since 2006, having previously been with a Big 4 firm in New Hampshire. Alan earned a bachelor's degree in accounting with secondary emphasis in political science from Saint Michael's College and he is a member of the American Institute of Certified Public Accountants and the New Hampshire Society of Certified Public Accountants. He is a graduate of the Greater Manchester Chamber of Commerce "Leadership Greater Manchester Program" and a member of the Board of Directors for the Special Olympics of New Hampshire and has been a volunteer member of the United Way Day of Caring.

Ned Gandevani, PhD, MBA

"Tariff Wars - Business Impacts"

Dr. Ned Gandevani is an author, professor and investment specialist. He is a graduate finance professor at Harvard University and the program chair for the Master of Science in Finance and Master of Science in Risk Management and Insurance in New England College of Business and Finance. He has extensive experience in academia and industry in the field of finance and risk management. Dr. Gandevani spent twenty years of his career as a trader and hedge fund manager, specializing in quant systems, macro strategies, and the utilization of different asset classes to maximize performance. His proprietary techniques and trading systems include the Trading Personality Profile (TPP) which helps securities traders identify their performance style and work toward their strengths.

John Keelan, SSA

"White Collar Crime"

Supervisory Special Agent (SSA) John Keelan has been an agent with the FBI for 20 years. He currently supervises the Corporate and Securities Fraud Squad of the Boston Division where he manages investigations involving frauds committed with or related to the securities of public companies. John's investigative priorities include: stock market manipulation; insider trading; embezzlement; money laundering; bribes and kickbacks; hedge fund frauds; and other investment frauds. Prior to his current

SPEAKERS

assignment, SSA Keelan supervised the Organized Crime Squad and New England Organized Crime Task Force, also in Boston. John has spent the majority of his career assigned to the New York City and Boston offices where he worked investment related frauds and Organized Crime, and served several years as an undercover agent. SSA Keelan received a B.S. degree from Babson College and a M.S. degree from Bentley University. Prior to joining the FBI, SSA Keelan served as the Sr. Capital Markets Specialist for the FDIC for several years. He has served as an adjunct faculty member of Western New England Graduate School of Business, where he instructed courses within the Finance/Investments discipline.

Rod Koch, CMA, CSA, PMP, CSM

"Data Analytics and the Future of Accounting"

Rod Koch is a Project Manager in the Business Transformation organization at Utica National Insurance Group. He has spent over 30 years working in various business/technology roles and has experience with multiple generations of technological change. He currently serves as a member of the IMA Board of Directors on the Performance Oversight & Audit committee and is the chair of the Audit sub-committee. He is also a member of IMA's Technology Solutions & Practices Committee, as well as a board member of the IMA New York-Ontario Regional Council and the secretary of the local Syracuse chapter. He writes articles on emerging technology topics for Strategic Finance magazine and makes presentations at the council and chapter level. Rod holds a B.S. in Accounting from Illinois State University, an MBA in Management Information Systems from Syracuse University, an MGM from Thunderbird School of Global Management, and an MS in Communications from Syracuse University. He is currently taking graduate courses towards an MS in Applied Data Science degree at Syracuse University.

Anthony Kvedar, CMA

"Emotional Intelligence"

Tony Kvedar is a part-time instructor for the Public Utility Institute of the Energy Council of the North East. In 2012 Tony retired from Green Mountain Power where he held a number of different positions in the accounting and finance area: including Tax Analyst, Budget Manager, Tax Manager, Assistant Controller, and Managing Director of Financial Planning; including responsibilities for rate case filings, financial forecast, project analysis, and merger and acquisition analysis. Prior to Green Mountain Power, Tony spent 13 years in tax enforcement for the state of Vermont, where he received IRS training. He was a member of the Vermont National Guard for 22 years and retired at the rank of First Ser-

geant. Additionally, Tony was an Adjunct Instructor at Trinity College and the University of Vermont where he taught courses in Accounting, Income Taxes, Corporate Finance, Management Accounting and Auditing. Tony earned a Bachelor of Science degree in Business Administration specializing in Accounting and a Master in Business Administration from the University of Vermont and held the designations of CPA and a Certified Rate of Return Analysts (C.R.R.A.) prior to his retirement. Tony is a member of the IMA Tampa Chapter

Amanda Magee

"Marketing to Millennials: You Have to Listen to Be Heard"

Amanda Magee is a partner at Trampoline, a 17 person creative agency in upstate New York. Trampoline works primarily with clients in destination marketing, higher education, municipalities, and the beer industry. Over the course of Trampoline's 16 years in business, Amanda and her partners have worked to include younger voices, not just in their research, but as members of their team. Amanda believes that the greatest ideas and strategies come from remembering one simple truth: people want to be considered. The consistent thread in sessions addressing marketing to Millennials has been that people seem to forget Millennials are people.

Tamara Morytko

"Leadership in Action: Stepping Out of Your Comfort Zone"

Tamara Morytko (Tammi) is part of the Senior Leadership Team in her role as Chief Operating Officer for Norsk Titanium. Tammi is responsible for overseeing the operating structure of Norsk, globally driving performance across units and departments between NY, London and Norway. Prior to joining Norsk Titanium, Tammi has accumulated 24 years in progressive leadership roles and experience with a background in the aerospace, defense and the oil and gas sectors. Tammi recently spent 8 years in Executive leadership roles for Baker Hughes, an Oil and Gas service provider headquartered out of Houston, Texas. Tammi's most recently held leadership role at Baker Hughes, was serving as the Executive Leader for all Asia Pacific operations located out of Kuala Lumpur, Malaysia. Before that, she held various leadership positions over a 14 year span at Pratt & Whitney Aerospace both domestically and abroad. Her professional start out of university was with Arthur Andersen, based out of NYC, where she spent 4 years as an auditor. Tammi is a graduate of Purdue University, where she earned her bachelor's degree and an MBA. Tammi resides in Connecticut with her husband Bryan and three sons.

SPEAKERS

Jeffrey Ring, CPA

"Corporate Tax Update 2019"

A Principal in BerryDunn's Tax Consulting and Compliance Group, Jeff has significant experience in financial products taxation, mergers and acquisitions, multi-state taxation, stock compensation, and bank tax matters. He has consulted with clients on a variety of matters including tax allowance for loan losses when approaching \$500 million, bad debt conformity elections, tax accounting for non-accrual interest, municipal lending pricing strategies, private foundation planning, information reporting requirements, deferred compensation, director compensation, corporate restructuring and capital infusion, business combinations, like kind exchanges, capital formation, LIFO planning, cost segregation studies, tax credit planning and a variety of other tax matters. Prior to joining BerryDunn, Jeff was the chief financial officer of a private equity fund. While there, he led the tax due diligence team, managed financial reporting and planning with respect to limited partner relationships, acted as interim CFO for various portfolio companies involving operating and capital budgets, strategic planning, financial reporting, tax compliance, and feasibility studies and worked with portfolio company management teams to achieve long-term and short-term business objectives. Jeff is a member of the American Institute of Certified Public Accountants and the Maine Society of Certified Public Accountants.

Joshua Tepley, PhD

"Theranos: A Case Study in Business Ethics"

Dr. Joshua Tepley is an Assistant Professor of Philosophy at Saint Anselm College. He received his Ph.D. in Philosophy from the University of Notre Dame in 2013. His current research interests include Twentieth-Century Continental Philosophy (especially Heidegger and Sartre) and Analytic Metaphysics.

Jeffrey Wheeler, CPA

"Accounting Update 2019"

Jeff is a principal in the audit practice at Baker Newman Noyes, specializing in providing audit and advisory services to commercial entities in the technology services and manufacturing sectors; not-for-profit organizations; investment entities; and employee benefit plans. He has been with the firm since 2002, having previously been with Arthur Andersen. In addition to serving clients, Jeff provides leadership to the firm by serving as the Director of the Firm's Audit Practice and member of the Firm's Management Committee. He is also a member of the firm's Quality Control Committee, as well as the Audit Training and Professional Development Committees. Jeff earned a bachelor's degree, with highest honors, in accountancy from Bentley University. He is a member of the American

Institute of Certified Public Accountants and the New Hampshire Society of Certified Public Accountants. He is a Board Representative for the UNH Center for Family Business; Treasurer, Board Member and Executive, Finance and Investment Committee Member for the Boys and Girls Club of Manchester. Additionally, he received the Director of the Year Award, for his leadership with the Boys and Girls Club of Manchester in 2008 and 2013 and Board Member, UNH Center for Family Business/CEO Forum Award.

Ginger White, CMA, CSCA, IMA Chair 2018 - 2019

"Current Trends in Corporate Purchasing"

Ginger White is Chair of IMA's Global Board of Directors for the 2018-2019 fiscal year. She also serves as chair of IMA's Governance Committee and as a member of the Nominating Committee. In May 2019, White joined the American Accounting Association as the Chief Operating Officer in FL. Her most recent position was the corporate purchasing finance director at Cummins Inc., a global power leader that designs, manufactures, sells, and services diesel and alternative fuel engines & electrical generator sets; and related components and technology. Based in Columbus, Ind., White supported Cummins global, direct, and indirect purchasing leaders with financial reporting and analysis. She was employed by Cummins for more than 21 years. An IMA member since 1999, White has held various positions on the Board of IMA's South Central Indiana Chapter, including a term as president. She also served on the Lincoln Trail Regional Council, where she was the IMA student representative, chair of the student committee, regional vice president, and president. She previously served two terms as chair of IMA's Member Relations Board Committee; a term as chair of the Performance Oversight and Audit, the Planning and Development, and the Nominating Committees.

Jeffrey Ziplow MBA, CISA, CGEIT

"Promoting Good Cyber Hygiene"

Jeffrey Ziplow is a partner in BlumShapiro's consulting group and is responsible for the firm's Risk Management and Process/Controls practices areas. He has significant experience working with organizations to assess their internal IT controls as they relate to business operations and helps to develop recommendations to mitigate risk. Jeff oversees the firm's cybersecurity risk assessments and provides insight and guidance on developing better security practices. In addition, he works on Process and Control related projects to enhance operational efficiencies and provide tangible control recommendations. Jeff also oversees various IT related audits based on the AICPA's SSAE-18 (SOC-1) and AT-101 (SOC-2) compliance standards as well as working with the NIST based standards.

LODGING AND INFORMATION

LODGING

Ashworth by the Sea
295 Ocean Blvd
Hampton, NH 03842

Tel: 603.926.6762
Website:
www.ashworthhotel.com

Register Early!

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

Room Rates: \$139 for a Single or Double

All rates are per night plus local and state taxes. The Resort Fee is waived and there is a Parking Fee of \$18.00 per car per day.

Conference rates are in effect while rooms are available or until the cut-off date of **August 23, 2019**.

Reservations may be cancelled up to 72 hours prior to arrival without penalty. Reservations cancelled within 72 hours will be charged. Please check with Ashworth by the Sea.

Information

Ashworth by the Sea can easily be reached from Manchester, NH, Portland, ME, and Boston, MA via I-95, which are an hour's drive away, and the closest airport is Manchester, NH Airport, less than 50 minutes from Hampton Beach.

The hotel is in an historic harbor setting and is located at Hampton Beach. There are many attractions nearby including Hampton Beach Casino, Granite State Whale Watch and outlet shopping in Kittery Maine.

Other areas of interest are Huckleberry's Candies, Smokey Quartz Distillery and Smuttynose Brewing Company!

NEWS YOU CAN USE

Council Meeting Sunday Afternoon

The NorthEast Regional Council will hold its quarterly meeting on Sunday September 22 from 1:15 PM—2:45 PM. All IMA members and conference participants are invited and encouraged to attend. Topics of discussions include: council financial report, IMA Global report, and upcoming Council events. This is a great opportunity to learn more about the IMA and the council.

Networking Reception Monday Evening - *new time!*

Don't miss this great opportunity to Network with Conference attendees while enjoying beverages and light snacks! This is an excellent time to make new friends and dinner plans!

September 23, 2019 6:00 PM-7:00 PM

Dinner Coordinator

Dinner is on your own Monday evening after the Networking Reception. Our Coordinator will be available to facilitate dinner groups for those interested in an expanded networking opportunity. Hampton Beach and the surrounding area is full of great restaurants - many within walking distance from Ashworth by the Sea.

Find us on 

facebook.com/NorthEast.Regional.Council.IMA

LinkedIn 

linkedin.com/groups/3306376



REGISTRATION

Registration

Register Online: at www.nerc.imanet.org

Payment online *or* by mail at time of registration

Register by Mail: Complete the registration form below and mail with payment to: **IMA NorthEast Regional Council**

c/o Mark Romboli, Treasurer

6 Captain Stanley Rd South Yarmouth MA 02664

Registrations will not be processed without full payment

Please check our website for conference updates

www.nerc.imanet.org

IMA NERC FALL CONFERENCE REGISTRATION FORM

IMA Member Number: _____ **IMA Chapter:** _____
(CPE's are electronically posted to IMA member accounts. Be sure to include your IMA member number)

Name: _____ **Designation (s):** _____

Preferred First Name for Badge: _____

Position Title: _____

Company: _____

Address: _____

City, State, Zip _____

Telephone: _____

E-Mail: _____

Do you have any special dietary requirements? Yes No

(Please let us know in advance if you have dietary restrictions or food allergies)

Dietary Requirements: _____

Will you be attending the following on Sunday September 22:

1:15-2:45 pm—Council Meeting Yes No

7:00-8:00 pm—Light Buffet Dinner (after last session) Yes No

PAYMENT INFORMATION

Conference Fee: Includes all sessions and meals except as noted	By 7/31/2019	On/After 8/1/2019	Full time Student with ID
	<input type="checkbox"/> \$295	<input type="checkbox"/> \$335	<input type="checkbox"/> \$150

- CHECK (*Make payable to: IMA-NERC*)
 CREDIT CARD - MasterCard Visa Discover Amex

Card Number: _____

Exp. Date: _____ **Security Code (back of card):** _____

Name as it appears on card (*Please print*): _____

Authorized Signature: _____

Billing address of credit card: _____

City, State, Zip: _____

REGISTRATION POLICIES

Conference Cancellation/Refund Policy: A refund will be issued if cancelled in writing by **September 13, 2019**. No refunds will be issued for cancellations after that date. IMA-NERC is only responsible for processing your 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 Ashworth by the Sea (603) 926-6762.

Photography: By registering, you agree and acknowledge that IMA-NERC may take photographs and capture video footage at IMA-NERC's 12th 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 12th Annual Conference, you grant IMA-NERC the right to your name and image for such purposes.

Liability Waiver: All registered participants agree and acknowledge that they are undertaking participation in IMA-NERC events and activities as their own free and intentional act, and are fully aware that possible physical injury might occur to them as a result of their participation in these events. Participants give this acknowledgement freely and knowingly that they are able to participate in IMA-NERC events and do hereby assume responsibility for their own well-being. They also agree not to allow any other individual to participate in their place.