

# IMA San Antonio Chapter Newsletter



**Chartered 1947—Our 74th year!!**

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++Past President

\*\*Passed 1st part CMA Exam

@@Passed both exams

## Student memeber

### Contact All Officers at

[SanAntonioIMA@gmail.com](mailto:SanAntonioIMA@gmail.com)

### Annual sponsor:

[TCG Trusted Capital Group, LLP](#)

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## Incoming President's Message

Dear IMA SA family,



In 2022, our chapter turns 75. And we are more vibrant than ever! I'm very excited to be a part of this chapter and to serve in the coming IMA fiscal year beginning July 1<sup>st</sup> as your president. I have been on the board for the past two years and I want to tell you I have received so much more than I have given by staying involved. The members are great and the team of volunteers is truly remarkable. Our chapter became stronger during the pandemic and meeting attendance in 2020 was up **62%** over 2019 and **253%** over 2018! While some chapters stopped

having meetings altogether or cut their meeting frequency in half, we continued to provide quality CPE sessions through web broadcasting. And as we return to in-person meetings starting August 21st, we will resume professional networking while continuing to offer events remote access for those who live out of town or need a little bit more time to feel comfortable venturing out of the house.

**October 1<sup>st</sup> and 2<sup>nd</sup>**, our chapter will host for the very first time the Texas Annual Conference for the Texas IMA Council. After a COVID required delay, it will finally be held at the scenic Hyatt Regency Hill Country Resort and Spa. Event details can be found at:

<https://SanAntonioIMA.wixsite.com/IMASA2021>. Early Bird Registration is now open! This is a family friendly event and you are encouraged to have your family enjoy this amazing venue!

As more people get comfortable meeting in person, we will resume our occasional in person meetings in Corpus Christi, Laredo and the Valley.

We are also excited about our new board for 2021-22. Not only does it have 20+ members, including some enthusiastic new volunteers, but it has more students and young professionals (nearly half!) than ever and more folks from all kinds of backgrounds. In addition, the chapter is aggressively working to provide value in the following new areas: **Fernando Hernandez** as VP for Latin American Engagement - to new and existing members well beyond our traditional South Central Texas footprint **Vic Dullas, CMA** as Director, Community Service - to lead the charge as the chapter gives back to the community. Please take this survey remember interest in possible projects. [IMA San Antonio Community Service Survey \(google.com\)](#). **Thomas Mills** as Photographer - to capture all the exciting activities to come in the next 12 months

In summary, I am proud of our chapter's accomplishments and am truly looking forward to an even more productive and engaging year ahead. You can reach me any time at [info@sanantonio-ima.org](mailto:info@sanantonio-ima.org).

Regards,

Farhana Khan

## 2021 Calendar by Lacey Stratemann VP Professional Education

<b>2021 Q1 Recap</b>				
Month/Date	Location	Topic	Speaker	Sponsor
January 14th	<del>San Antonio</del> Virtual	SA Chapter Board Meeting (All chapter members are welcome)	N/A	N/A
Jan 21st (2 hrs. CPE) <b>CMA Appreciation Night</b>	<del>San Antonio</del> Virtual	Forensic Accounting @ SAPD	Gilbert Barrera, J.D., M.P.A. (Professor, Texas A&M SA)	<a href="#">Bowtie Business Intelligence</a>
		The Impact of Recent Legislation and Litigation on ERISA Retirement Plans	Ryan Canales (Certified Plan Fiduciary Advisor, Empower Wealth Advisors)	
		<b>Student Member Internship Fair</b>		
Feb 18th (2 hrs. CPE)	<del>San Antonio</del> Virtual	Interview and Resume Tips	Kelly Kjlajic Powers (Managing Partner, Powers Professional Partners)	<a href="#">Houston Business Automation LLC</a>
		Components of a Good Anti-fraud Policy	(Professor, Texas State University)	
		<b>Student Member Internship Fair</b>		
Mar 18th (2 hrs. CPE)	<del>San Antonio</del> Virtual	Bowtie Business Intelligence Client Success Story	Olia Bosovik (Director of Sales & Marketing, Bowtie Business Intelligence) + Peter Swanson (Founder + CEO)	<a href="#">Powers Professional Partners</a>
		Applying lessons from the book, <u>Atomic Habits</u> , by James Clear	Kevin Eliasen (Data Mgt Analyst, Security Service Federal Credit Union)	

### Q2 Recap

April 8th	<del>San Antonio</del> Virtual	SA Chapter Board Meeting (All chapter members are welcome)	N/A	N/A
April 15th (tax day)	Virtual	No Meeting	N/A	N/A
April 22nd (1 hr. CPE)	<del>San Antonio</del> Virtual	Using games to train and engage accounting teams	Presented in Partnership with KC Mo chapter Zac Jarrad	N/A
April 23rd	Virtual	IMA's Women Leadership Summit	Multiple	N/A
April 24th 8:30 am	Virtual	Texas Council Meeting (All chapter members are welcome)	N/A	N/A
April 29th 1 hr. CPE	<del>San Antonio</del> Virtual	How to Present Data Meaningfully & Accurately	Mike Lovelace, CMA	N/A
May 20th (2 hrs. CPE)	<del>San Antonio</del> Virtual	Anti-Money Laundering Success Stories	Terri Wright (owner, Terri J Wright Consulting)	<a href="#">Becker CMA Review Course</a>
		IMA's PACE (Profit Analytics Center of Excellence) to compare strategy and the COSO framework for ERM (Enterprise Risk Management)	Fernando Hernandez (Sr. Director, MyABCM US)	
June 12	San Antonio	SA Chapter Board Meeting	N/A	N/A
Jun 13—16th (24 hrs. CPE)	Virtual	ACE 2021	Multiple	Multiple

### Q3 Upcoming Events

Month/Date	Location	Topic	Speaker	Sponsor
Jun 17th (2 hrs. CPE)	Virtual	2 Hour Ethics Case Study	Jennifer Larson, CPA (Tax Manager/Sol Schwartz CPAs) & Russell Gaines, CMA (Operational & Financial Controller)	<a href="#">Brandon Howard CPA, PLLC</a>
July 15th (2 hrs. CPE)	Virtual (100%)	Working Styles of Different Generations	Bruce Howard (Exec Dir, South Texas Alliance of Career Champions) & Brandon Howard (UTSA Lecturer)	TBD
		Baby Steps to Getting Out of Debt and Building a Financial Legacy	Allie Medvecky (Controller, Cancer Insights LLC)	
July 17th 8:00 am	Virtual (100%)	Texas Council Meeting (All chapter members are welcome)	N/A	N/A
August 19th (2 hrs. CPE)	San Antonio (Hybrid)	Fraud, Lies and Hermes Ties (Fraud at HealthSouth)	Aaron Beam (Former CFO, HealthSouth)	TBD

### Q4 Upcoming Events

September 19th	N/A	No Meeting (Please Attend Conference October 1st—2nd)	N/A	N/A
October TBD	San Antonio TBD/Virtual	SA Chapter Board Meeting (All chapter members are welcome))	N/A	N/A
October 1st—2nd (12 hrs. CPE)	San Antonio Hyatt Hill Country Resort (In Person 100%)	Texas Council CPE Workshop	Multiple	Multiple
October 21st	N/A	No Meeting (Please Attend Conference October 1st—2nd)	N/A	N/A
November TBD	Brownsville Harlingen TBD	TBD	TBD	TBD
November TBD	Laredo TBD	TBD	TBD	TBD
November 4th—6th (2 hrs. CPE)	Virtual	IMA Student Leadership Conference	Multiple	TBD
November 18th (2 hrs. CPE)	San Antonio (Hybrid)	The Value of a CMA in a Not for Profit	Torey Reese, CMA (Controller @ Veterinary Emergency Critical Care Society)	TBD
		Modern Day Financial Frauds	Ronald Long (4x Author and Former County Sheriff)	
December TBD	Corpus Christi (TBD)		TBD	TBD
December 16th (2 hrs. CPE)	San Antonio (Hybrid)	TBD	TBD	TBD

**Texas Council Annual IMA Conference Preliminary Speakers and Topics  
October 1st—2nd Hyatt Hill Country Resort**

<b>Topics</b>	<b>Speakers</b>
Opening Remarks: Recent Results & Direction of IMA & Mgt Acctg/Finance Profession	Jeff Thomson (CEO, IMA)
Career Advice, Certifications	Bud Kulesza (Man of Many Hats)
Client Success Story	Melissa Juenke (Implementation Lead, Finit Solutions)
CMA Exam Structure & Tips	Wiley or Becker TBD
Electronic Record Storage	Mimi Dionne CA, CDIA, CIP, CRM, IGP, MLJS, PMP (RIM Mgr of McKesson)
Ethics Case	Bud Kulesza (Man of Many Hats)
Fraud	Dan Ramey (President, Houston Financial Forensics)
Future Trends in Accounting & Finance	Blake Oliver (Cohost of the Cloud Accounting Podcast)
IFRS Convergence..... Not!	Dr. Dennis Elam (Associate Professor, TAMUSA)
Leadership: Creating a Company Culture that Reflects Your Values	Kevin O'Driscoll (Owner, RIY Business Group)
Lessons Learned from the Book <u>Atomic Habits</u> by James Clear The Power of Habits	Kevin Eliassen (Data Mgt Analyst, Security Service Federal Credit Union)
Navigating Organizational Change	Blake Blackmar (Fmr Big XII Starting Football Player)
Socionomics	Dr. Dennis Elam (Associate Professor, TAMUSA)
Tech Track: Cybersecurity	Sid Shaffer (VP and Chief Delivery Officer, ITEGRITI)
Tech Track: Data Analytics	Lawrence Coffee (Director, Data Analytics, Vaco LLC)
Tech Track: Finance Transformation	Jerrad Hall (Partner, Finance Transformation, Vaco LLC)
Tech Track: Round Table	Neal Juern (Managing Director, Juern Technology)
Tech Track: TBD	TBD
Closing Season: Project Management & Risk Management in Climbing Mt. Everest	Alan Mallory (Speaker, Author, Performance Coach)

**Register Here!**

<https://sanantonioima.wixsite.com/imasa2021>

### Q3 Campus Outreach Update by Addison LePere, VP Campus Outreach

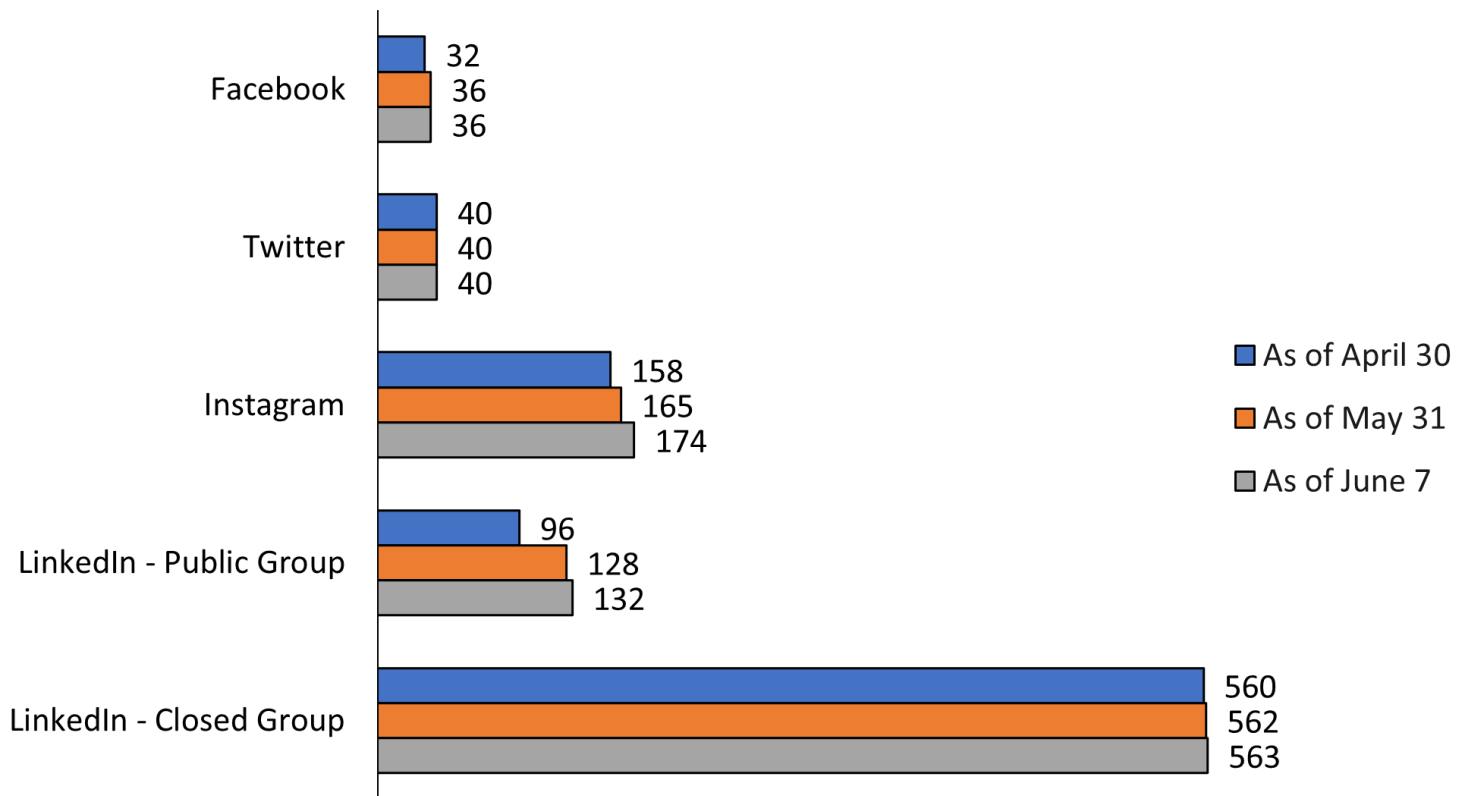
We were able to present to students 11 times at 7 different universities this past Spring 2021 semester. Additionally, the San Antonio Chapter assisted the Houston Chapter with their Academic Faculty Dinner with the help of IMA Global in April. If you know any faculty that would be interested in having our chapter present to them, please share the Campus Outreach email with them or share their email with us. Or, if you are a member and have 1 hour, reach out to us to be a part of one of these presentations. We may have some summer presentations and will have presentations in the Fall semester – so if you are interested in participating in these, please reach out to us at [campusoutreach@sanantonio-ima.org](mailto:campusoutreach@sanantonio-ima.org)

<u>Q1 (Completed):</u>	<u>Q2 (Completed)</u>	<u>Q3/Q4 Target</u>
Texas A&M University – San Antonio	Austin Community College	TBD
Texas State University	Baylor University	
Trinity University	Texas A&M University—Corpus Christi	
	Texas A&M University—Kingsville	

### Social Media News by Amanda Craig, Digital Ambassador

The IMA San Antonio Chapter is officially on social media We are posting regular updates about meetings and other great opportunities for our members from other chapters and IMA Global. Please Follow, Like, and Share to stay updated and be reminded about ways to get involved with the chapter! Our original LinkedIn group called [San Antonio Chapter of the IMA](#) is what LinkedIn called closed because inclusion has to be approved. The [closed group](#) is still very active and has over 550 members. We created an open page for the San Antonio Chapter to reach a wider audience outside of the original closed group. Please follow our new [public LinkedIn page](#), [Instagram](#), [Facebook](#), and [Twitter!](#)

### Quarter 2 - Social Media Presence



## Membership Update by Mike Lovelace, CMA, VP Engagement

The last few months have been very busy for the chapter and the rest of 2021 is going to be even busier! We've had some truly fantastic speakers so far with more on the way.

IMA Global is now allowing in person meetings beginning August 1st!. We are promoting the **Oct 1 & 2 Texas Council CPE event** as happening at Hyatt Hill Country Resort & Spa,

We are expanding **CMA Spotlights** - to include new chapter members with interesting reasons for joining in this newsletter (on [Page 8](#)) and through our various social media platforms - as a way to highlight the achievements of our members and promote awareness of the CMA designation. There are quite a few members in the pipeline just behind those you have seen so far. For all of you who are studying, keep up the great work! For anyone who has wondered if they should pursue CMA, the answer is Yes! Contact the chapter for more information to plug into our network of encouragers.

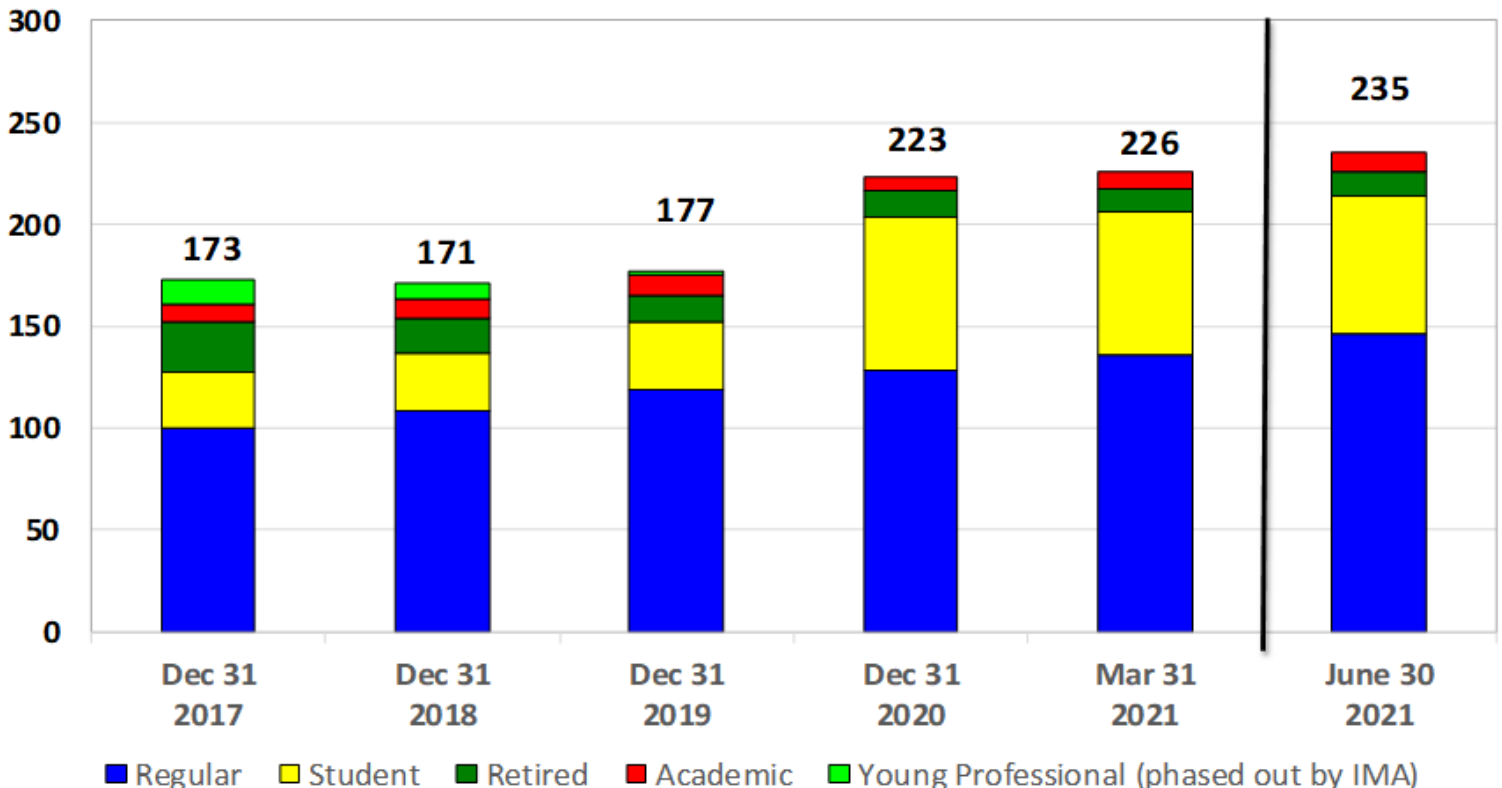
Our **Campus Outreach** (see [Page 5](#)) continues to do a great job sharing the word about IMA and the CMA in general and our chapter specifically. If you have never participated in one of these, I encourage you to do so. We have a standard deck we present and split up speaking responsibilities by comfort zone. In fact, if you are terrified of presenting, you can just come along and be present. No need to even speak at all till you see how easy the process is and how appreciative the students are for professionals to tell them about any path other than Big 4.

In the coming week or two, you will once again get an email from us asking for your **home and work zip code** (if we don't already have them). This is part of a ground breaking pilot program described on [Page 9](#) as a cooperative effort among several chapters but led by San Antonio.

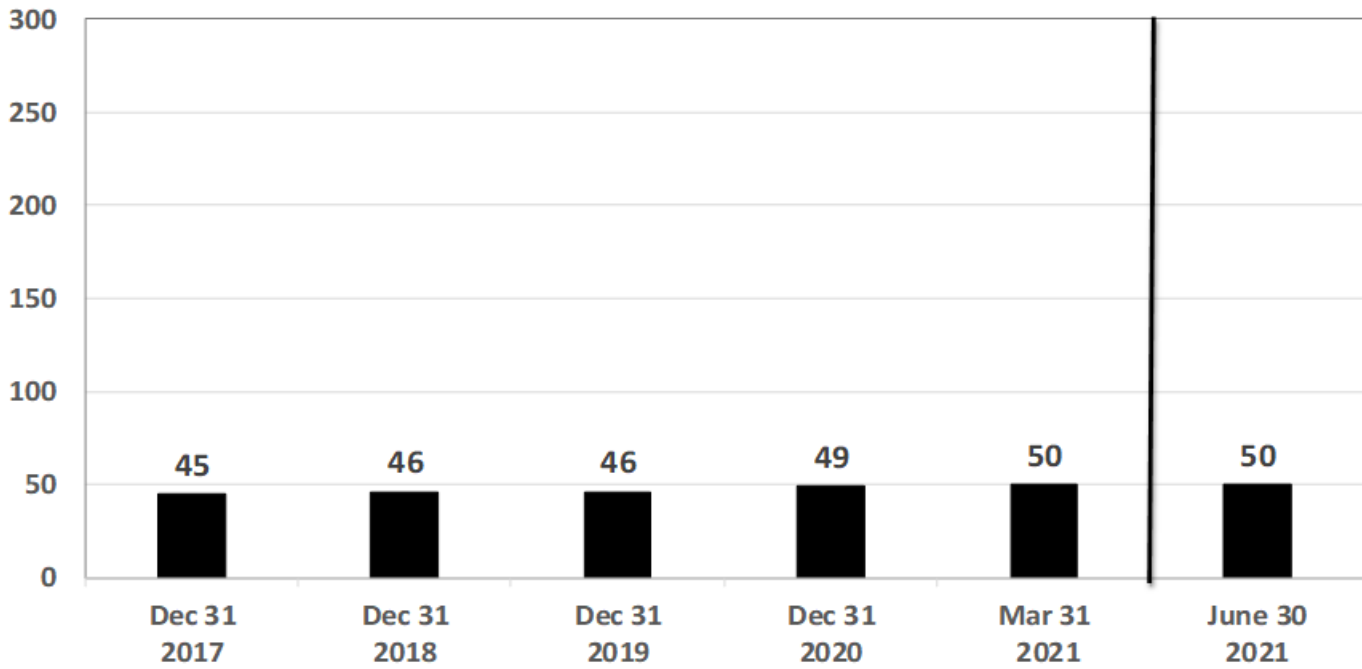
**The one thing that's missing from all this is your colleagues.** Invite them to come with you to an upcoming event and see the value for themselves. We'd love to have them join a winning team!

Your chapter is the most active chapter in Texas and certainly among the most active in the US. Way to go, San Antonio!

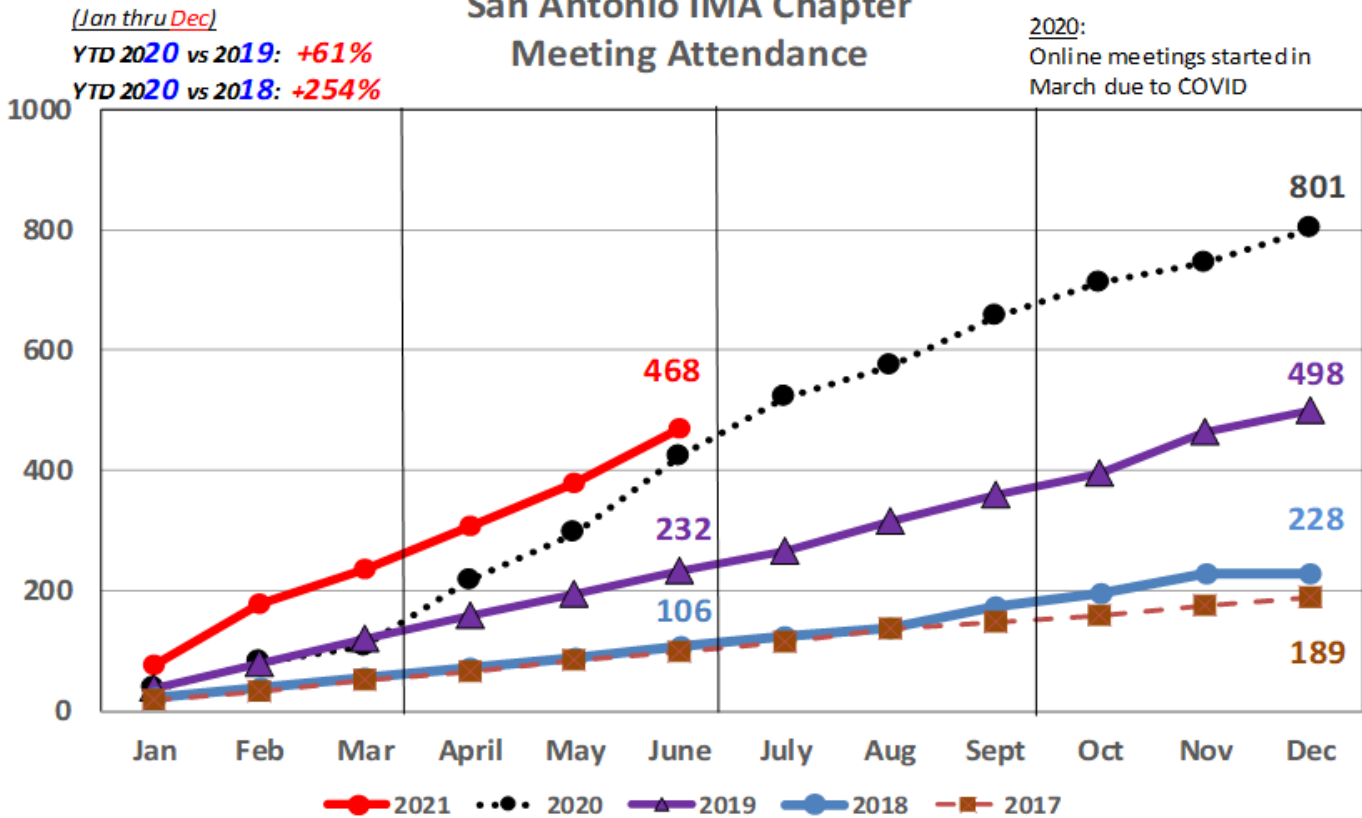
### San Antonio Chapter Membership



### # of CMAs, San Antonio



### San Antonio IMA Chapter Meeting Attendance



## **Congratulations - New CMAs!**

Dr. Anne-Marie Lelkes, CMA:



“The CMA designation enhances my qualifications by showing that I’m knowledgeable in strategic planning, budgeting, decision-making, and cost management. The CMA, which is recognized internationally, allows me to network with other CMAs to enhance the knowledge that I pass on to my students. The process to become a CMA updated me in all the areas that the Exam covers. As a professor who is also a CPA, I encourage my students to get certifications to provide themselves competencies and competitive advantages in pursuing and landing excellent careers. I was a first-generation college student who obtained a Ph.D. in Accounting, then CPA, and now CMA. All this shows students that they can do it as well if they have the determination to do so.”

Oliwia Fowler, CMA:



“Becoming a CMA is one of my greatest accomplishments because while it is a very prestigious and globally recognized credential, it takes really hard work and perseverance to pass the CMA exam. I’ve been working as an accountant for over 10 years, but the CMA gave me credibility, confidence and visibility. Attaining the CMA improved my skill set tremendously and allowed me to advance in my career. The knowledge I gained during my studies I was able to use in all areas of my job as an Accounting Supervisor including financial analysis and planning such as budgeting and forecasting, internal control and reporting. I strongly encourage everybody who wants to stand out in the finance industry and be in high demand to pursue a CMA designation.”

## **CMA Progress**

IMA has a formal CMA program entrance process. Our chapter is interested in supporting your success in this endeavor and speeding you through the two exams as quickly and painlessly as possible. As part of that effort, we maintain an email list of chapter members who are currently preparing for the exams and help them to share knowledge and successful strategies and to encourage each other. That list has approximately 15 members on it. If you would like to be added, please contact [SanAntonioIMA@gmail.com](mailto:SanAntonioIMA@gmail.com).

## **Welcome to the IMA SA Chapter (joined/transferred since April, 2021)!**

Angela King ##	Cymbrey Kappmeyer ##	Jack Price ##	Jose Prieto Sanz	Ridglea Callahan ##
Armando Castro	Elizabeth Popov ##	Jennifer Namie ##	Jynned Ruiz ##	Sigurdur Atlason ##
Brett Devos	Elvia Carranza ##	John Lee	Mayte Gallardo	
Christopher Totten ##	Heather Rodriguez ##	John Danklef ##	Nguyen Dieu AnVu ##	



**IMA Community Service** by Vic Dullas, CMA, Director of IMA SA Community Service  
IMA San Antonio exists to serve local accounting and finance professionals with continuing educational programs and networking opportunities. This year, IMA San Antonio intends to expand its purpose and commitment to be more impactful to our community. 2020 was a challenging year and caused a lot of uncertainties to families. IMA San Antonio is committed to being part of the solutions to these uncertainties and giving hope through community services that have a direct impact to our community. Therefore, we are conducting a short survey, which aims to provide us insights of our members’ interests in working together and serving the community. We encourage all of our dear members to be part of this journey. Thank you in advance for taking your time and completing [IMA San Antonio Community Service Survey](#).



## IMA SA Chapter Welcomes Its New VP Communications, Eric Newswanger!

I joined the San Antonio Chapter because of several interactions with different active members. Initially, I was introduced to IMA through my cost accounting professor who sparked my personal interest in this area of accounting and introduced my class to the organization by encouraging us to attend the 2020 IMA Student Leadership Conference last November and write a short essay on the experience.



For me, that was especially easy because I landed a summer internship at Cummins Diesel in Indiana from it. I wasn't sure which chapter to join since I am from the Dallas area, attend college in San Marcos and have no idea where I will end up after graduating. Enter Mike Lovelace. He reached out to me on LinkedIn asking me about my (at the time, upcoming internship) and why I hadn't joined a chapter. After a great conversation, I decided the San Antonio chapter was the right chapter for me.

By joining the chapter, I expect to expand my core competencies in managerial accounting and strive to acquire a CMA certification. I knew this chapter has frequent, high value presentations with knowledgeable speakers from all areas of the profession that can help me grow. I agreed to serve on the board because I know the best way to get a lot out a membership is to be an active member and this role could be done from Indiana over the summer. I hope to serve you all well.

## What's your B.H.A.G.? by Bruce Howard, Director Workforce Development

Even though it's almost the middle of the year it feels like the beginning of the year since our lives and businesses are returning to a somewhat normal situation (whatever that is, right?). We have all been through a lot so now it's time to refresh and reset. It's time to set some goals and objectives. There are goals for our business, our family and ourselves. What are you doing about making plans to enhance your professional life in the next six months? Or year? Or five years? Basically, what is your B.H.A.G.?



If you enjoy the book by Jim Collins, "Built to Last: Successful Habits of Visionary Companies", you will recognize this acronym. It stands for **Big Hairy Audacious Goal!** Is having a goal for your career development important? Do you know where you are headed with your career? How about spending some time, this summer in creating a B.H.A.G. for your career!

A B.H.A.G. is a clear, compelling, enthusiastic, and motivating plan. Here are a few steps you can take towards establishing your B.H.A.G. First review your own personality to think about what fits you and how you can use those personal skills and strengths towards building your career. Next, think about answering these questions: What do you like to do? What do you want to do? Where do you want live? Who will value your skills? Answering these questions will give you the pool of information necessary to build your B.H.A.G. Once you have completed this reflection you will want to put some research into the employment market to see if your goal is realistic. Is there a real job with this title? Am I being realistic about potential compensation? Can I do this in the town I live in? Afterwards you are ready to design the steps necessary towards accomplishing your goal. This might include new training, networking activities and other investments necessary for the journey. So go ahead, you can do it---reach high and share your plans with others so they can help you accomplish your Big Hairy Audacious Goal for 2021! Remember, you oversee your career! But I'm here to help you anywhere along the way! Have a great summer!

## Be an Important Part of Something New!

How? By telling us your zip code! =)

This is a pilot initiative designed to demonstrate the value to IMA Global for how chapters can be more responsive to their members. Your chapter is partnering with 5 or 6 other chapters (to defray costs) to buy a single license for [eSpatial.com](https://www.espatial.com). This Software as a Service enables us to map member and visitor provided zip codes with meeting attendance frequency to give Board members a better understanding of where our attendees are and identify more convenient meeting locations. NOTE: In order to protect each member's data privacy, IMA does NOT disclose zip codes much less street addresses - to the chapter. If you have not previously opted in by providing just your zip code to the chapter, please email it to [SanAntonioIMA@gmail.com](mailto:SanAntonioIMA@gmail.com). No personally identifiable information will ever be uploaded to this software.

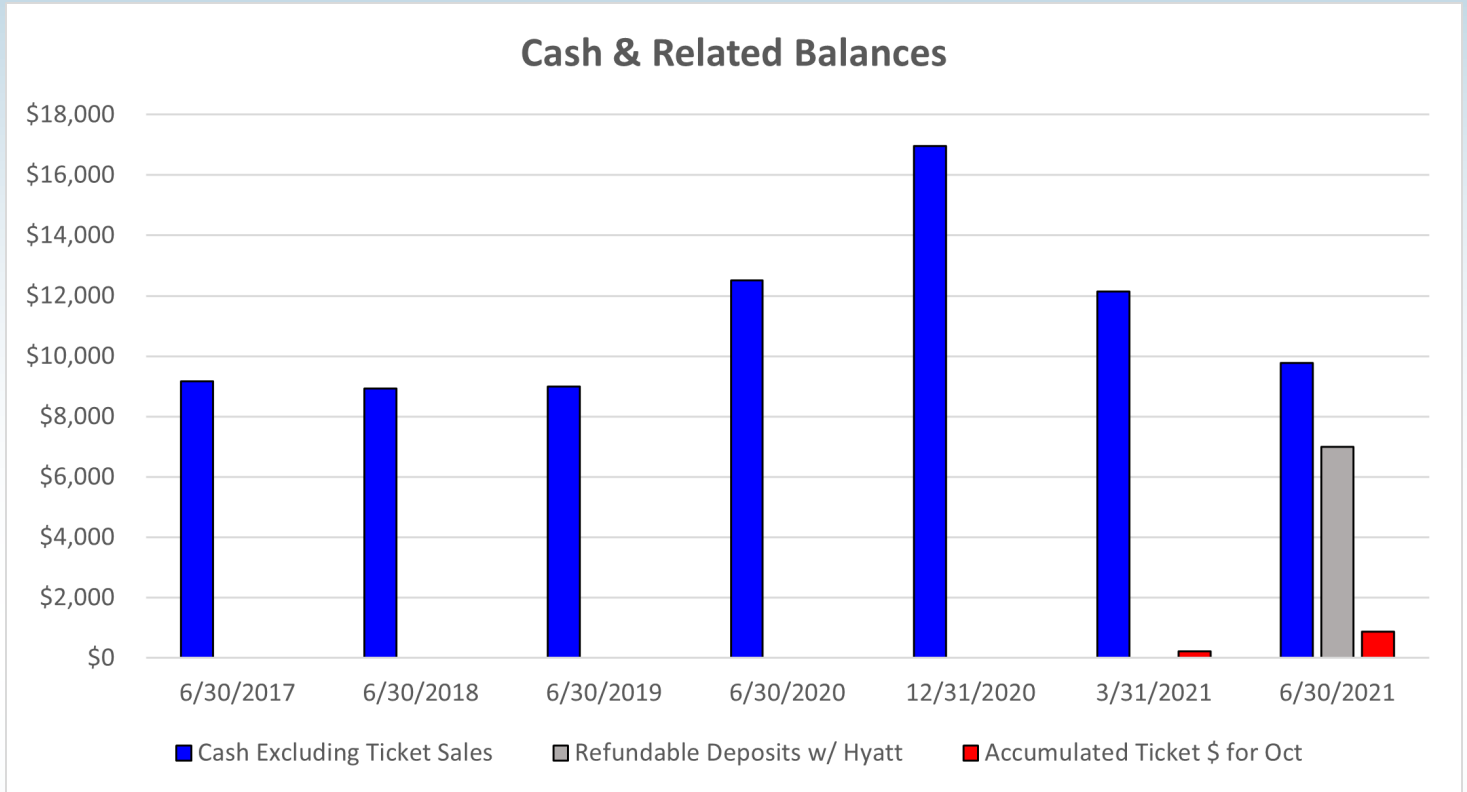
## Get More Out of Your Membership

Get Involved! How much time do you have? (contact [SanAntonioIMA@gmail.com](mailto:SanAntonioIMA@gmail.com))

- |                  |  |
|------------------|--|
| 1 hour, 1 time:  | Join a team making a campus presentation (happens throughout the year) |
| 2 hours, 1 time: | Judge the student case competition submissions (happens in March)      |
| 2 hours/month:   | Attend the chapter meetings (3rd Thursday of every month)              |
| 5 hours/quarter: | Help with these awesome newsletters! (doing these quarterly in 2021!)  |
| 1 hour/week:     | Volunteer to join the Board in a role you are passionate about         |

## Treasurer's Report by Torey Reese, CMA, Treasurer

The last quarter of the year saw many activities. We received two more payments for E-Spatial Software. Also, we continued to receive monthly meeting sponsor payments and membership allowance. We have upgraded the Microsoft Business contract from one paid account to 4 paid accounts starting from May 2021. The chapter also supported the first annual old board, new board meeting with a pizza brunch. As we have opened the registration for October regional meeting, ticket sales are picking up. The deadline for early bird ticket price is July 31<sup>st</sup>, 2021. The yearend balance for fiscal year June 2021, our estimated total cash balance is **\$9,781**.



### Chapter Mission

The San Antonio Chapter (#0090) of the Institute of Management Accountants was chartered in 1947 and is part of the IMA Texas Council (Dallas/Ft. Worth, Houston, El Paso, Laredo and Austin). We exist to serve local accounting and finance professionals with continuing education programs and networking opportunities. If you are a college student, young professional, college faculty, or seasoned professional, we have services and meeting content that will help you in your career. If you are a retired professional, we can help you stay in touch with peers and remain informed on current topics.

### Did You Know?

You can support the chapter financially without even buying a meal?! IMA compensates a chapter for each of its members who attends and earns CPE from IMA webinars even if you don't need the CPE to maintain a license. It's not a lot, but over the course of a year and across all chapter members, it really adds up!

### Another Chance to Win!

To find out how many of you are actually reading our newsletter, enter to win a free dinner for you and a colleague at the next in person SA Chapter meeting of your choice! Two winners will be chosen at random from all non-board members who enter by July 31, simply email the Chapter at [SanAntonioIMA@gmail.com](mailto:SanAntonioIMA@gmail.com). All members and non-members are welcome to enter!

### Winners From April Edition

Burhaan Khan	Kelley Powers
Martin Lindenberg	Mark Weido
Terri Wright	Thomas Mills
Torey Reese, CMA	