

IMA San Antonio Chapter Newsletter



**Charted 1947—Our 74th year!!
January 1, 2021 Volume 2, Issue 1**

Officers

President

Yolanda Solano

VP Administration

Jan Williams

VP Communications

Tim Christ

VP Engagement

Mike Lovelace, CMA

VP Professional Education

Andrew Cord

VP Student Outreach

Addison LePere ***

Digital Ambassador

Amanda Craig ***

Secretary

Allie Medvecky ***

Treasurer

Farhana Khan

Analytics & Special Projects

Brian Butler

Directors

Ira Copple

Russell Gaines, CMA

Jennifer Larson +++

Newsletter Editor

Hope Harrell

+++Immediate Past President

***Passed 1st part CMA Exam

Contact All Officers at

SanAntonioIMA@gmail.com

President's Message



Despite COVID in 2020, our meeting attendance was up **62%** over 2019 (which was already a great year) and **253%** over 2018. We also had record breaking turn out of **128** to our June web meeting! Besides our monthly meetings in SA, we expect to resume

meetings at Corpus Christi, Laredo and Brownsville just as soon as COVID allows.

If you are interested in volunteering or joining the board or if you have any suggestions, please reach out to me or another board member. See page 5 on ways to plug in!

As a result of our strong growth in 2019 and 2020, your chapter was asked to host the April 2021 Texas Council CPE weekend! We are excited to announce that Jeff Thomson, CEO of IMA, will be making the opening remarks. See inside for more details!

I look forward to an even better 2021!



Topics Presented at the December 2020 Meeting:



Tax Update

Presented by:

Kalyn Carroll - ATKG



Basics of Estate Planning

Presented by: **Brandon Howard, Brandon L Howard CPA PLLC**

Annual sponsor:

Empower Wealth Advisors

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2021 Calendar

| Month/Date | Location | Topic | Speaker | Sponsor |
|---|--|--|--|---|
| Jan 21st (2 hrs. CPE) CMA Appreciation Night | San Antonio Virtual | Forensic Accounting @ SAPD | Ira Copple (Controller, Lock'er Down, Inc.) & Gilbert Barrera, J.D., M.P.A. (Professor, Texas A&M, SA) | Bowtie Business Intelligence |
| | | The Impact of Recent Legislation and Litigation on ERISA Retirement Plans | Ryan Canales (Certified Plan Fiduciary Advisor, Empower Wealth Advisors) | |
| | | Student Member Internship Fair | (Deadline to participate is Friday, January 15th) | |
| Feb 18th (2 hrs. CPE) | San Antonio Virtual | Interview and Resume Tips | Kelly Kjlajic Powers (Executive Recruiter, Powers Professional Partners) | Houston Business Automation LLC |
| | | Components of a Good Anti-fraud Program | Dr. Carolyn Conn (Professor, Texas State University) | |
| | | Student Member Internship Fair | (Deadline to participate is Friday, February 12th) | |
| Mar 18th (2 hrs. CPE) | San Antonio virtual | Bowtie Business Intelligence Client Success Story | Olia Bosovik (Director of Sales & Marketing, Bowtie Business Intelligence) | TBD |
| | | Applying lessons from the Atomic Habits , by James Clear | Kevin Eliassen (Data Mgt Analyst, Security Service Federal Credit Union) | |
| Apr 15th (tax day) | N/A | No Meeting | N/A | N/A |
| Apr 23—24th (12 hrs. CPE) | San Antonio Hyatt Hill Country Resort | Texas Council IMA Conference | Multiple | Multiple |
| May 20th (2 hrs. CPE) | San Antonio | Anti-Money Laundering Success Stories | Terri Wright (owner, Terri J Wright Consulting) | TBD |
| | | 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) | |
| Jun 13—16th (24 hrs. CPE) | Scottsdale Arizona Virtual | Multiple | Multiple | Multiple |
| Jun 17th (2 hrs. CPE) | San Antonio | 2 Hour Ethics Case Study | TBD: 2 SA Board Members | TBD |
| TBD | Corpus Christi | TBD | TBD | TBD |
| TBD | Laredo | TBD | TBD | TBD |
| TBD | Brownsville | TBD | TBD | TBD |

Save the Dates:

(Topics, Speakers and Sponsors TBD)

July 15th, August 19th, September 16th, October 24th, November 18th, December 16th

Texas Council Annual IMA Conference Preliminary Speakers and Topics April 23rd—24th

| Topics | Speakers |
|--|---|
| Recent Results & Direction of IMA & Mgt Acctg/Finance Profession | Jeff Thomson (CEO, IMA) |
| IMA Student Case Competition World Champions | Addison LePere Amanda Craig Caitlyn Grimes Hannah Torres |
| IFRS Convergence..... Not! | Dr. Dennis Elam |
| Client Success Story | Melissa Juenke |
| Tech Track: TBD | Neal Juern |
| Electronic Record Storage | Mimi Dionne |
| Career Advice, Certifications | Bud Kulesza |
| Tech Track: Data Analytics | Lawrence Coffee |
| Navigating Organizational Change | Blake Blackmar |
| CMA Exam Structure & Tips | Wiley TBD |
| Tech Track: Excel 301 | Brian Butler |
| Fraud | Dan Ramey |
| Finance Transformation | Jerrad Hall |
| Tech Track: Round Table | Brian Butler/Tim Christ/Neal Juern |
| Socionomics | Dr. Dennis Elam |
| Ethics Case | Bud Kulesza |
| Future Trends in Acctg & Finance | Blake Oliver |
| Project Management & Risk Management in Climbing Mt. Everest | Alan Mallory |

Count Me In!

Did you know that we have our very own IMA podcast, Count Me In? This podcast includes everything affecting the accounting and finance world! The podcast brings the latest perspectives and insights on accounting and finance to you from the experts. Listen to it today to sharpen your skills and gain inside knowledge! Here are a couple of common places that you can find the podcast: Spotify, Apple Podcasts, Podbeans, and of course, the IMA website.

Campus Outreach Update



2020, even with its challenges, was a very successful year for campus presentations! Our goal for 2020 was **30** new student members. I am thrilled to report we ended the year with **54**! We made **15** presentations at **9** universities:

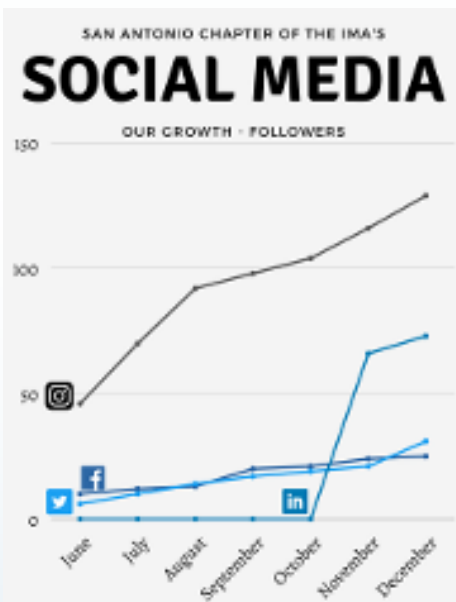
- 1) Austin Community College
- 2) Baylor University
- 3) St. Mary's University
- 4) Texas A&M International
- 5) Texas A&M Kingsville
- 6) Texas A&M San Antonio
- 7) Texas State University
- 8) Trinity University
- 9) University of Incarnate Word

Presenters included Allie Medvecky, Brian Butler, Yolanda Solano, Ira Copple, Farhana Khan, Addison LePere and Mike Lovelace. In March, this year's presentations transitioned to an online format which enabled us to reach more students in new locations. As a result, we presented to Texas A&M Kingsville for the first time. We also held a virtual Faculty Dinner in October where the participants of the dinner enjoyed a custom ordered and delivered meal from MOD pizza while watching the online presentation.

We won the full amount of the MEF Grant that will allow us to give partial scholarships to IMA student members who are attending the Texas Council Annual Conference in April (see page 3). *Academic Members, if you would like us to come to or present virtually to your class, let us know. Or, if you are a member and have 1 hour, then come and join us for one of these presentations. Contact us at SanAntonioIMA@gmail.com.*

Social Media News

The IMA San Antonio Chapter is officially on social media. Our Digital Ambassador established the chapter's Facebook, Twitter, and Instagram in May 2020 and LinkedIn in November 2020. 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* (<https://www.linkedin.com/groups/2122350/>) is what LinkedIn called closed because inclusion has to be approved. The closed group is currently 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. If you are a part of the closed group, please follow our new public LinkedIn page!



You can easily find our social media by pointing your phone's camera or a QR reader at this QR code! A small pop up should appear, which when clicked will take you to a list that includes the shortcuts to our social media and website.



SAN ANTONIO CHAPTER OF THE IMA'S
SOCIAL MEDIA
FOLLOW US TODAY!

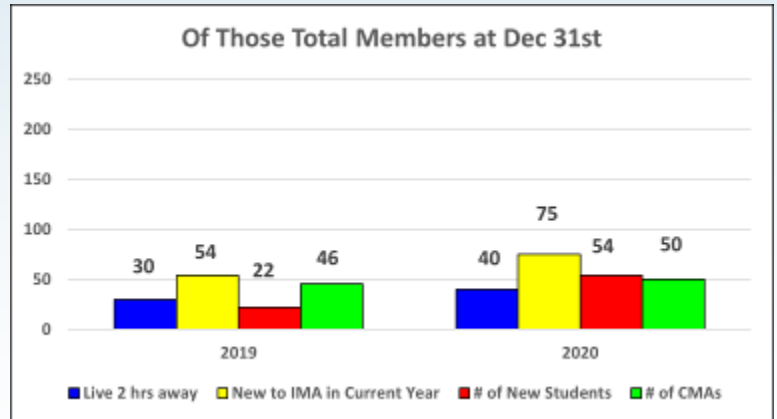
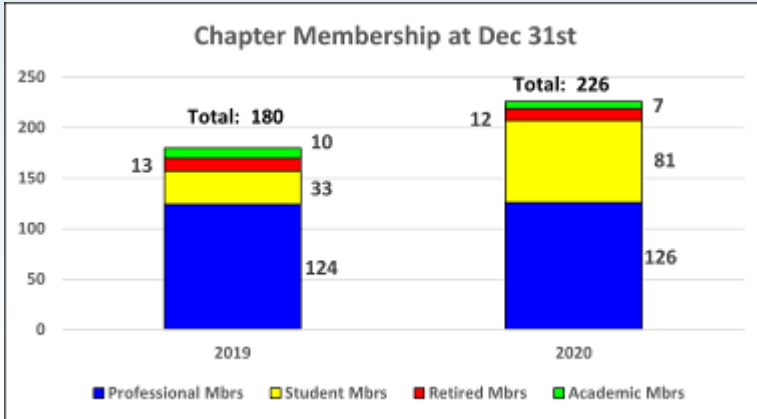
- San Antonio Chapter of the IMA**
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Membership Update, Continued

Q: How Do I Get More Out of My Membership?

A: Get Involved! How much time do you have? (contact 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 February / March)
- 2 hours / month: Attend the chapter meetings (3rd Thursday of every month)
- 5 hours / quarter: Help with these awesome newsletters! (will be doing these quarterly in 2021!)
- 1 hour / week: Volunteer to join the Board in a role you are passionate about.



Top Frequent Attendees of 2020

10 or more meetings:

Andrew Cord
 Brian Butler
 Farhana Khan
 Julie Lynch
 Mike Lovelace, CMA
 Russell Gaines, CMA

9 meetings:

Ira Copple
 Jan Williams
 Yolanda Solano

8 meetings:

Amanda Craig***
 Joyce Shambrock, CMA

7 meetings:

Addison LePere***
 Dwain Dehmlow
 Jenifer Larson
 Jennifer Larson
 (Bd Mbr)
 Jill Schafer
 Sue Clark
 Torey Reese, CMA

***Passed 1st part CMA Exam

Milestone Membership Anniversaries in 2020

| | |
|----------|----------------------------|
| 60 years | Dean Bloyd |
| 50 years | Hector Cavazos |
| 40 years | Alex Barber |
| 30 years | Scott Teeter, CMA |
| 20 years | Cheryl Peery |
| 10 years | Amy Vilela |
| | Josie Hernandez |
| | Tiffany Schwartz Rano, CMA |

Tech News

As a Chapter, it's very important that we communicate effectively. I'm excited to share that we're moving towards an Office 365 environment that will enable multiple email addresses for people to reach specific Board members rather than the single g-mail account. We will publish those email addresses using the new domain "@sanantonio-ima.org" very soon.

Also, as we move towards having in-person meetings again, we are implementing the technical infrastructure that will allow members and visitors in remote cities to gather locally and view our content live without the need to travel to San Antonio.

Longest Registered Chapter Members

Dean Bloyd (1960) and William Schuh (1965)

Membership Update

New CMAs in 2020

Congrats to the new CMAs!! Way to go!!!

Dr. Amy Holmes, CMA



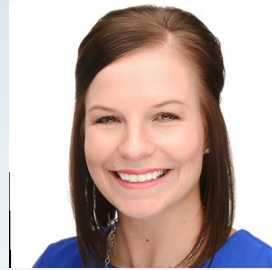
Kevin Spears, CMA



Garrett Gold, CMA



Meagan Scholz, CMA



Torey Reese, CMA



Member in the News

For the 2nd year in a row, our chapter's very own Mike Lovelace, CMA, has been selected to present at the IMA Annual CPE Conference in June. Mike will be co-presenting with a colleague, Lawrence Coffee, on the topic of Business Intelligence and Data Analytics for Small to Medium-sized Businesses. Way to go, Mike!

Don Russell Chapter Volunteer of the Year Award

In February, 2020, Allie Medvecky was announced as the inaugural recipient of this award named in memory of long time active chapter member, Don Russell. Allie worked tirelessly to promote our relationships with area universities in 2019 which has resulted in the tremendous spike in student members we are now enjoying. Look in this space in the next newsletter where we will announce the 2020 recipient to be presented in early 2021.



Virtual Intern Fair for Student Members

This January and February, the chapter will host a virtual intern fair exclusively for SA chapter student members as a way to help them gain invaluable work experience despite the lingering effects of COVID 19. Students will have the opportunity to narrate a 45 - 60 second self introduction to the chapter at either of the monthly web meetings. Companies will then follow up directly with the students to further interview them. Internships may be for either the spring or summer: part-time or full-time. Student members need to complete the one page slide template about themselves and return it to SanAntonioIMA@gmail.com no later than Friday, January 15th or Friday, February 12th respectively. This info will then be promoted to hundreds of San Antonio area companies that either have chapter members or are friends of the chapter.

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. No personally identifiable information will ever be uploaded to this software.

Treasurer's Report

In September, the chapter is in great financial shape! We received the maximum amount of \$2000 MEF (Memorial Education Fund) grant from IMA. Most of this grant will be utilized to subsidize the student attendance fee for our IMA council annual conference in April. We received \$100 meeting sponsorship from the following awesome businesses in 2020:

| Month | Company | Contacts |
|--------------------------|---|---------------------|
| Jan | Adra by TrinTech | Charles Shepherd |
| Feb | SmartBridge Consulting | Raj Raju |
| Mar | Juern Technology | Neal Juern |
| Apr | Wenzel and Associates, CPAs | Chad Wenzel |
| May | Report Alliance | Mike Tartaglino |
| Jun | JMS Sanchez CPAs, PLLC | Juan Sanchez |
| Jul | Analytects | Melissa Juenke |
| Aug | SteadyPay | Anthony Strike |
| Sep | Accelytics Consulting | Ash Jain |
| Oct | BBVA | Brandon Purdy |
| Nov | SOL HR | Marisol Lopez |
| Dec 2020—Nov 2021 | Empower Wealth Advisors | Ryan Canales |



Shout out to **Ryan Canales from Empower Wealth Advisors** who became our first ever annual sponsor. Thank you, Ryan!

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

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! If you have any questions, Contact SanAntonioima@gmail.com.

Tell Your Friends!

Ring in the new year with the gift of the CMA® (Certified Management Accountant) and discover how it can make a difference in your career. Now through **January 6**, take advantage of **40% off the CMA entrance fee and IMA membership** with promo code **SAVE40**. In addition, new CMA candidates also get a free virtual workshop with a live Q&A session. This new workshop covers key steps and important strategies to help you pass your CMA exams on the first try. (Offer not valid on CMA exam registrations or IMA membership renewals).

Mission of the Chapter

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). The chapter is part of the Stevenson Division which contains chapters that have more than 125 competition members.

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.