

Conference Registration and Lodging Information

Conference Registration Fees:

Includes all sessions and meals except as noted

Register by 07/31/26 \$380

On/After 08/01/26 \$425

Register online: nerc.imanet.org

Lodging:

Wellsworth Hotel (508) 765-8000
14 Mechanic Street wellsworthhotel.com
Southbridge, MA 01550

Make your hotel reservation early!

To reserve a room at conference rates, you must call the hotel directly at (508) 765-8000 and request the room block rate for the NorthEast Regional Council of the Institute of Management Accountants (NERC IMA). You will not get the rate if you book online or use any "800" toll-free service.

Room Rates: \$139 for a Single or Double

All rates are per night plus local and state taxes.

Conference rates are in effect while rooms are available or until the cut-off date of **August 20, 2026**.

Hotel reservations must be cancelled **48 hours prior to arrival to avoid a charge of 1 night's room and applicable tax**. Please check with the Wellsworth Hotel.

For the full brochure, conference policies, and online registration, scan here or visit our website.



nerc.imanet.org

Networking Event

Monday Evening

September 21, 2026 5:30 PM-7:00 PM

Join us for refreshments, light snacks, and great conversation as we bring together the brightest minds in accounting to share ideas, make connections, and build lasting professional relationships.

This event is an excellent opportunity to expand your network and gain insights beyond the conference sessions.

There will be drawings for special door prizes too!

Thank You to our Partners!

Host Chapter

Boston

Supporting Chapters

Eastern CT

Hartford

New Hampshire

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IMA NorthEast Fall Conference

Presented by



The Association of
Accountants and
Financial Professionals
in Business

NORTHEAST REGIONAL COUNCIL



The Association of
Accountants and
Financial Professionals
in Business

BOSTON CHAPTER

18th Annual Fall Conference

ADVANCE
YOUR
CAREER

REGISTER
EARLY AND
SAVE!!

September 20-22, 2026
Wellsworth Hotel
Southbridge MA

18.5 Hours Continuing Professional Education Credits



CONFERENCE AT A GLANCE



Sunday - September 20, 2026

- ◆ 1:00–2:30 PM CONFERENCE CHECK-IN
- ◆ 1:00–2:30 PM LIGHT LUNCH
- ◆ 2:30–2:45 PM ANNOUNCEMENTS
- ◆ 2:45–4:00 PM *"Predictive Liquidity: Using AI & Machine Learning to Improve Cash Flow"*
Michael Krahn CMA, CSCA, CPA, PMP 1.5 CPE
- ◆ 4:00–4:10 PM BREAK
- ◆ 4:10–5:25 PM *"From Chaos to Clarity: Managing Uncertainty in Complex Project Environments"*
Dr. Jacques Alexis PhD 1.5 CPE
- ◆ 5:25–5:35 PM BREAK
- ◆ 5:35–6:50 PM *"Mergers and Acquisitions: Best Practices"*
Brian Conefrey CMA, CSCA 1.5 CPE
- ◆ 7:00 PM **DINNER ON YOUR OWN**

Monday - September 21, 2026

- ◆ 7:00–7:45 AM BREAKFAST
CONFERENCE CHECK-IN
- ◆ 7:45–8:00 AM ANNOUNCEMENTS
- ◆ 8:00–9:15 AM *"When the Old Ways No Longer Work: Building Team and Leadership Agility in Times of Change"*
Joan Pierre 1.5 CPE
- ◆ 9:15–9:30 AM BREAK
- ◆ 9:30–10:45 AM *"Funding Your Future with the Small Business Administration"*
Kristi Haxhij 1.5 CPE
- ◆ 10:45–10:55 AM BREAK
- ◆ 10:55–12:10 AM *"Expanded IMA Competency Framework"*
Travis Willard 1.5 CPE
- ◆ 12:10–1:10 PM LUNCH
- ◆ 1:10–2:25 PM *"Practical and Impactful Non-Profit Metrics for Risk Management"*
Rinku Bhattacharya CMA 1.5 CPE

Monday - September 21, 2026

- ◆ 2:25–2:40 PM BREAK
- ◆ 2:40–3:55 PM *"Get in the Know Before the Numbers Show: FASB, GASB, and IFRS Key Updates"*
Melissa Ferrucci CPA 1.5 CPE
Jason Newman CPA
- ◆ 3:55–4:05 PM BREAK
- ◆ 4:05–5:20 PM *"Connecting the Dots: TRUE Networking"*
Mark Zampino 1.5 CPE
- ◆ 5:20–5:30 PM END OF DAY ANNOUNCEMENTS
- ◆ 5:30–7:00 PM **NETWORKING EVENT**

Tuesday - September 22, 2026

- ◆ 7:00–7:45 AM BREAKFAST
CONFERENCE CHECK-IN
- ◆ 7:45–8:00 AM ANNOUNCEMENTS
- ◆ 8:00–9:15 AM *"The Great Banking Reset: How Risk, Regulation, and Technology are Rewriting Finance in 2026"*
Dr. Ned Gandevani PhD, MBA 1.5 CPE
- ◆ 9:15–9:25 AM BREAK
- ◆ 9:25–10:40 AM *"AI for Financial Leaders: Building Intelligent, Safe, and Effective Finance Operations"*
Heather Dawood 1.5 CPE
- ◆ 10:40–10:50 AM BREAK
- ◆ 10:50–12:30 PM **ETHICS SESSION**
"Beyond Debits and Credits: The Psychology Driving Ethical Decisions"
Mike Ruff CMA, CPA, CGMA 2.0 CPE
- ◆ 12:30–1:30 PM BOX LUNCH
CLOSING (Drawing for free conference!)

Please visit our website for conference updates

nerc.imanet.org

The IMA NorthEast Regional Council and the IMA Boston Chapter invite you to join us for another great event!!

*Southbridge Massachusetts
September 20 - 22, 2026*

Why You Should Attend

This conference offers **18.5 CPE** credits with **12** educational sessions covering key management accounting areas.

Hear from inspiring industry leaders on AI for Cash Forecasting, Leadership Agility, SBA Funding, Risk Management in Non-Profit, Banking Industry Reset TRUE Networking, M&A Due Diligence, Change Management, IMA Competency Framework, FASB/GASB/IASB Updates, AI for Financial Leaders, and Ethical Decisions.

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!!

We begin on Sunday afternoon at **1:00 pm** with conference check-in and a light lunch followed by Conference Welcome & Announcements at **2:30 pm**. There are 3 sessions on Sunday from **2:45 pm to 7:00 pm**. *Dinner will be on your own.* On Monday we have a full day of sessions immediately followed by our **Networking Event** at **5:30 pm**. There are 3 sessions on Tuesday and we close at **1:30 pm** with our Conference Farewell, a box lunch, and drawings for door prizes including a free registration to the IMA NorthEast Regional Council Fall 2027 Conference. See the full brochure on our website for more detail on topics and speakers.

Please visit our website to register