

# QUALIFIED OPINION

Sept. 2018

## Board of Directors

### President

Angela Combs

### Secretary

Paul Bukowski

### Treasurer

Blaine Kuneman

### Communications

Chuck Zimmerman

### CMA Director

Christopher Wozniak

### Community Service

Evan Scarbrough

### Scholarships

Sue Bos

### Manuscripts

Zafar Khan

### Student Chapter (EMU)

Robert Okopny

### Membership

Howard Dodds

### Website

Clarke Macy

### Meetings & Membership

Barb Cable

### CMA/CFM Programs

Lisa Beaudoin

### At-Large Directors

Bob Baird



## ACE Awards Luncheon 2018



The Association of  
Accountants and  
Financial Professionals  
in Business

**Buffalo Wild Wings:** 3150 Boardwalk Drive, Ann Arbor, MI 48108

**Time:** 5:30-8:30pm

**Date:** **September 20, 2018**

**Price:** \$5 for students – \$10 for members – \$20 for guests/non-members

### ***DIDN'T YOU KNOW ABOUT THIS?***

The Ann Arbor IMA has Meals-on-Wheels on the second Saturday of every month from 10:30 to 12:00. If you are interested in joining the party, contact ***Evan Scarbrough*** at [eascarbro@gmail.com](mailto:eascarbro@gmail.com). Ideas for possible community service for the future are definitely welcome and will be considered!

Check out our website:  
[www.imamichigan.org/  
annarbor](http://www.imamichigan.org/annarbor)

The **CSCA**<sup>™</sup> (Certified in Strategy and Competitive Analysis) is a specialty credential designed specifically for CMAs\*, which complements and expands upon the strategic planning and analysis skills developed through the CMA<sup>®</sup> (Certified Management Accountants) certification.

This credential will help you master the concepts and techniques that are required to earn a seat at the leadership table and become a key player in driving the strategic planning process at your organization.

### **CMA Prep**

Cleary University will be offering **preparation classes** for the *Certified Management Accountant (CMA)*

Exam at its Livingston campus. See <http://www.cleary.edu/cma/> for more details.

### **News of Interest**

Contact me, Chris, at my email below if you have ideas for the newsletter. We always are interested in adding to the board of directors, too.

[christopherwozniak@  
outlook.com](mailto:christopherwozniak@outlook.com)

## ***First Chapter Meeting of 2018-19***

***Thursday Sept. 20, 5:30pm - 8:30pm***

***Buffalo Wild Wings, 3150 Boardwalk, Ann Arbor***

***Speaker: Dr. Lou Petro (See Bio Below)***

***Topic: "Internal Controls"***

***Email Barb at [bcable.rsvp@gmail.com](mailto:bcable.rsvp@gmail.com) to register!***



**Connect with us on LinkedIn:**

[www.linkedin.com/groups/ima-  
ann-arbor-chapter](http://www.linkedin.com/groups/ima-ann-arbor-chapter)

Lou Petro is a Senior Manager with Cendrowski Corporate Advisors (CCA). Lou is a consummate accounting and finance professional, and has nearly five decades of experience assisting Fortune 500 clients, closely-held firms, and attorneys through operational assessments, risk assessments, fraud investigations, and forensic accounting engagements. Lou's accounting skills have helped organizations uncover large-scale frauds as well as implement remediation methods designed to deter fraud.

In addition to his professional experience, Lou is active in academia. Since 1969, he has taught auditing, systems, accounting, and finance courses at 11 different colleges and universities across the Midwest and in Canada. He was Dean of the Lawrence Technological University (LTU) School of Management from 1979 through 1989. Lou has also held consulting and auditing positions at the CPA firms of Ernst & Young, Plante Moran, and Grant Thornton.

Lou is a Certified Public Accountant (CPA) in Michigan, Certified Fraud Examiner (CFE), Certified Internal Auditor (CIA), Certified Computing Professional (CCP), Certified Information Systems Auditor (CISA), Certified Management Accountant (CMA), Certified Financial Manager (CFM), as well as a Registered Professional Engineer (PE). He remains active in Continuing Professional Education (CPE) for CPAs, CIAs, and CMAs, and regularly conducts classes and seminars for the Michigan Association of Certified Public Accountants (MACPA), the Oakland University CPE Program for CPAs, the Institute of Internal Auditors (IIA), the Institute of Management Accountants (IMA), and Defense Finance and Accounting Services (DFAS). Lou is also a subject matter expert for the CMA program, and is coauthor of *The Handbook of Fraud Deterrence and Private Equity: History, Governance, and Operations*, both published by John Wiley & Sons.



The Association of  
Accountants and  
Financial Professionals  
in Business

# 17<sup>th</sup> Annual IMA Michigan 2018 Fall Conference

**Monday, October 29, 2018**  
**Kellogg Center-Michigan State  
University**  
**Meeting starts at 8:00 AM with  
Registration and Networking**  
**8 hours of CPE with 2 hours of Ethics  
Training**

### Conference Fees

Members by October 7.....	\$ 150
Members after October 7.....	\$ 190
Nonmembers by October 7.....	\$ 190
Nonmembers after October 7...	\$ 240
Student .....	\$ 60

A \$5 Convenience Fee is added to all credit card payments

Price includes Parking, Continental Breakfast & Lunch

**Register by October 7 to receive the  
Early Bird Discount**

## Speakers

### John L Daly



John L. Daly is a Chelsea, Michigan-based management consultant specializing in costing, pricing strategy and pricing model development. He has taught continuing professional education courses since 1995 and began doing ethics seminars two weeks before the Enron scandal. John has been CFO for a Tier 1 automotive parts supplier and a large restaurant chain and COO for a window treatments manufacturer and retailing chain. He is the author of *Pricing for Profitability*, published by Wiley & Sons, Inc.

### Kristie Stocker



is an inspirational speaker, mentor, life coach, teacher, master encourager, team builder, leader, designer

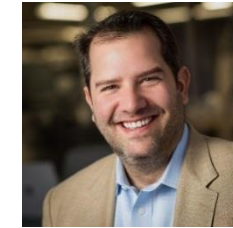
Kristie offers thought-provoking perspectives on leadership, team harmony, time management and defining personal purpose. As CEO and founder of Kinetik Edge, a coaching and training organization, she offers a unique message on how to bring harmony to one's personal and professional life.

With decades of positively influencing individuals and groups, Kristie has been described as genuine, funny and a master at energizing her audience. Her messages use relatable stories in a warm and conversational style to guide her listeners with game-changing information they can use right now. She is best known for using her positivity and strength as a visionary to transform people's thinking. Audience members will walk away enlightened with practical actions steps they can take. Most importantly, her listeners will have fun doing it!

Kristie has won countless national and regional awards in speaking, communication and design. She's passionately involved in leadership roles for non-profits like the American Lung Association, Toastmasters International and Hope for the Hungry. Kristie also founded the 3 Scoops of Inspiration movement and blog and lives to serve and motivate others to their greatest potential.

## Speakers

### Christopher Keslin



Chris's unique skillset empowers businesses that are navigating today's emerging and turbulent fourth industrial revolution. His research in experimental physics combined with deep technical and business training at Avanade, Microsoft, and Accenture, as well as his first-hand experience as partner and owner of a multimillion dollar international consultancy, informs his unique perspective and ability to successfully bridge the gaps between business executives and technologists.

Chris's career highlights include:

- Designed and oversaw the implementation of the Audit Data Synchronization Platform for two of the Big Four accounting firms
- Expert Witness in a 14-month multimillion dollar lawsuit in Melbourne, Australia
- Delivered multiple three-day executive briefings to Fortune 50 C-Suite executives at Microsoft's EBC in Redmond, WA.
- Simultaneously managed multiple high-stakes, mission-critical multimillion dollar engagements
- Delivered AI solutions for predictive maintenance and forecasting across multiple industry verticals ranging from finance, manufacturing, retail, and hydraulic engineering.

Following a 20-year career of consulting and travel, Chris is now focused on educating and helping small-and medium-sized enterprises execute their own digital transformations. Residing in South Bend, IN, Chris is now committed to building a healthy and thriving environment for business technologists in local communities.

**For more information on this conference  
or to register, please visit our website  
[www.michigan.imanet.org](http://www.michigan.imanet.org)**

**or this link  
<https://www.123signup.com/event?id=hnbzk>**

## Speakers

### Mark P Hass



Mark Haas serves as Michigan State University's Vice President for Finance and Treasurer. He joined MSU in 2010 and has served as the Chief Financial Officer.

Haas has more than three decades of university, government, financial, and managerial experience, along with a broad and deep knowledge of all aspects of financial operations necessary to manage the multiple aspects of MSU's finances. At MSU, he has overseen staff responsibilities for treasury and banking functions, cash and debt management, investments, contract and grant administration, endowment administration, risk management and insurance, financial reporting, purchasing and logistics, licensing, and recycling. Mark previously worked in Michigan State government for 32 years serving four Governors. Haas last served as the State of Michigan's Chief Deputy Treasurer. In that role, he served as a principal adviser to the Governor and State Treasurer, overseeing 2,200 employees and an operating budget of \$1.9 billion, investments of \$63 billion, and a \$50 billion banking operation.

Work experience extends to currently serving on the boards of the MSU College of Law Foundation Board, University Club Board, and as Treasurer of the Michigan History Foundation.

Mark received his Bachelor of Science in Business Administration and Master of Arts in Economics from Central Michigan University, attended graduate school at the University of Wisconsin-Madison, and worked toward a Ph.D. in Economics at Michigan State University. Also, he attended the Harvard Kennedy School and the Yale School of Management for post graduate programs in public policy and investments, respectfully.

---

*If you have any questions, please call or email our conference chair at 313-549-8729 or [chuck.phillips@imadetroit.org](mailto:chuck.phillips@imadetroit.org)*

## Speakers

### Christian Cuzick



Christian Cuzick, CMA is the Vice President of Finance at Johnson & Johnson Vision Surgical, in Santa Ana, Calif. He has been with Johnson & Johnson (J&J) for more than 13 years, holding positions of increasing responsibility both internationally and in the U.S.

Cuzick started his career at Johnson & Johnson in 2004 as a Business Analyst at LifeScan. In 2007, he was promoted to Finance Director in the Medical Device segment, relocating with his family to Zug, Switzerland. During his time in Switzerland, Cuzick held the position of Treasurer and President for the Swiss IMA Chapter. Cuzick repatriated to the U.S. in 2012 to take the role of Finance Director, Innovation within Medical Devices. In his most recent role, he served as the Senior Director, Janssen Canada, located in Toronto, Canada. Before joining Johnson & Johnson, Cuzick held various positions in Marketing at BASF and Sony. Christian Cuzick, CMA is Chair-Elect for the IMA's fiscal 2018-2019 period.

---

## Sponsor/Partners

**TM Group**  
**Robert Half International**  
**Gleim**  
**Campfire Interactive**  
**Comerica**  
**Facton**

**Please call or email Chuck Phillips at 313-549-8729 or [chuck.phillips@imadetroit.org](mailto:chuck.phillips@imadetroit.org) if you are interested in being a Sponsor/Partner**

## Speakers

### Jonathon W. Schumaker



Jonathon is a member of the Tax Department at UHY

**PROFESSIONAL EXPERIENCE:**  
Experience in corporate and flow-through entity federal, multi-state and local taxations  
Monitors client tax reporting

requirements, law changes, application and liabilities  
Experience with clients with multiple related entities and tiered partnerships  
Significant experience on clients with international reporting and foreign tax credits

#### **BACKGROUND:**

Licensed CPA in the state of Michigan

M.S. in Taxation, Walsh College

M.S. in Accounting, Western Michigan University

B.S. in Accounting, Western Michigan University

#### **ACTIVE & PRIOR PROFESSIONAL MEMBERSHIPS:**

Member – Michigan Association of Certified Public Accountants

Member – American Institute of Certified Public Accountants

---

## Program Moderator



Douglas T. Hicks, CPA is President of D. T. Hicks & Co., a consulting organization concentrating on the decision costing needs of small and mid-sized organizations. Before establishing his firm in 1985, he accumulated over fifteen years of financial and management accounting

experience, twelve of those years in the industry. A graduate of the University of Michigan - Dearborn's School of Management, he is a member of the Michigan Association of CPAs and the Institute of Management Accountants. He is also a member and serves on the Executive Committee of the Society of Cost Management. In 1997, he was presented with the University of Michigan – Dearborn Alumni Association's Professional Growth and Scholarship Award in recognition of his work in the development of advanced cost measurement and management. Doug is a member of the Detroit Chapter IMA.

---