



The Association of
Accountants and
Financial Professionals
in Business

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Employment News

Please contact [Bob Shapiro](#) if you have a job available or if you are looking for an employment opportunity.

Dear Akron IMA,

Please join your fellow IMA Members for **Welcome** Night on Wednesday, September 18, 2019 at the HILTON GARDEN INN, 1307 E. MARKET ST., AKRON, OH 44305. **RSVP deadline is Friday, September 13th.**

Check in starts at 5:15 pm. Dinner will be served at 5:45 p.m. sharp. Cost for Members is \$25.00. Non-members pay \$30.00. Pre-Technical Session begins at 6:10 p.m. Technical Session begins at 7:10 p.m. Cost is \$0.00 if you are not having dinner. 2 CPE credits this month. Student members always pay \$10 for dinner.

Please forward newsletter items to: [IMA Newsletter](#).

Thanks!
Kelly Heil

Follow us on Twitter!

Did you know... you can follow the chapter on Twitter [@AkronChapterIMA?](#) Follow us and keep up to date on news and events for your chapter!

President's Message

Welcome back, Akron chapter! Over the summer the decision was made to absorb the Canton chapter into the Akron chapter. We are excited to add new members to our rolls and hope that we will see many of them at our chapter meetings this year. We are set to kick off on September 18 at the Hilton Garden Inn. I hope to see all of you there!

Joe Richards
IMA President
2019-20



2019-2020 Meeting Schedule

Regular meetings for 2019/2020 will be the following:

- Wednesday, September 18, 2019 – Welcome Night
 - Wednesday, October 16, 2019 – Awards Night
 - Wednesday, November 20, 2019 – Game Night
 - Wednesday, January 15, 2020 – CMA/CSCA/CFM Night
 - Tuesday, February 18, 2020 – Students' Night (Location TBA)
 - Wednesday, March 18, 2020 – Guest Night
 - Tuesday, April 21, 2020 – Social Networking Night (no pre-tech session)
 - Wednesday, May 20, 2020 – Past Presidents' Night
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September Dinner Meeting

Hilton Garden Inn

September 18, 2019

Welcome Night

Agenda:

Registration opens at 5:15pm

Buffet Dinner at 5:45pm

Pre-Tech Session begins at 6:10pm

Technical Session begins at 7:10pm

Pre-Tech Session - "Qualified Retirement Plans Update"

Michael M. Spickard, EA, MSPA, CPC, QPA

Managing Member, Chief Compliance Officer & Investment Adviser Representative

As a registered investment adviser, Michael's goal and passion are to help individuals and business owners prepare for the future through prudent investment management, thoughtful financial planning, and experienced business exit planning.

Before founding Summit Financial Partners, with his brother Dan, Michael spent more than 28 years as a business owner and pension actuary – helping small and large businesses manage virtually all activities related to their corporate retirement plans. He was privileged to be an Executive V.P. with CBIZ, the President of Tegrit Group, and CEO/Owner of Summit Retirement Plan Services.



Way back when (1990), Michael graduated from the University of Akron with a degree in Mathematics. While starting, building and selling companies, he has always remained local to the Akron area with his wife Penny and their four children. Michael and his wife live on a small farm outside of Akron with their dogs and chickens (not to mention several species of unwelcome varmints). All four of their kids have escaped the farm, but thankfully stayed local so that Michael and his wife can enjoy their beautiful six grandchildren.

Summit Financial Partners - www.summitfps.com

Technical Session - "Excel Data Tools and PowerBI"

Don Tomoff

Director, Invenio Advisors LLC



Don is the founder of [Invenio Advisors LLC](#), a consulting firm specializing in information management, process improvement, reporting and data analysis, as well as education and training. Don's experience includes "Big 4" public accounting, senior-level industry finance positions, and consulting. Don's industry experience includes serving eight years with Jo-Ann Stores as VP, Finance and Treasurer.

Since 2010, Don has focused his efforts with executives and companies on many digital process improvement, data analytics and training initiatives, including developing and implementing mobile information strategies. His efforts are focused on the identification of process improvement opportunities, and leveraging readily available technology tools to drive that change. In addition to consulting, Don is an instructor for the [Business Learning Institute](#) and a regular speaker for companies and conferences.

Fatheads Brewery Tour

Please join us on September 14th, 2019 at Fatheads Brewery for a 1 hour tour. There is a max of 15 people per tour, but there are multiple timeslots on Saturdays if you are interested and our timeslot is full. **Reservations must be made in advance on the Fatheads website.**

Time: 3:00pm

Date: September 14th, 2019

Location: 17450 Engle Lake Abram Drive, Middleburg Heights, OH 44130

Reservations: fatheads.com/brewery-tours.html

Cost: \$10 (includes a Fatheads glass and a 12 oz beer – please sign up and pay online!)

We hope to see you there!

Significant Gleim Savings until September 14!

Gleim recognizes the value of IMA Chapters and so they are providing members with a special offer now through September 14th. Save up to \$475 when you pre-order the 2020 edition of Gleim CMA Review! Chapter members will receive a remarkable 32% discount on the Gleim Premium Review System until September 14th. As a Strategic Partner of IMA Gleim has arranged to be able to provide a special for 30% off the CMA exam entrance fees now thru September 14!

The latest edition covers 2020 CMA exam topics and is equipped with SmartAdapt™ technology which personalizes your review and eliminates the guesswork of studying.

And in this latest edition you'll also enjoy:

- Even more videos covering the toughest topics and providing question walkthroughs
- Enhanced books and online platform for a more accessible, intuitive experience
- The best bank of exam-quality questions and explanations
- Dedicated support from Personal Counselors and Accounting Experts
- +Access Until You Pass® guarantee

If you plan to sit for any part(s) of the exam this year, the 2019 edition is still available, and if you need to switch to the 2020 edition, Gleim has you covered! Their Access Until You Pass® guarantee makes sure you have up-to-date materials as long as you're studying, no matter when you plan to take your exam.

If you have any questions or concerns about this offer, our representative, Alexandra Graham, can be reached via email at alexandra.graham@gleim.com or by phone at 1-800-874-5346 ext 428.

Orders can also be placed online at Gleim.com/IMAChapter or by using your chapters' custom ordering link. Please note that the 32% discount will be displayed at check out and not on the initial welcome screen.

If you contact Alexandra, she will guide you through the process. Note that our Chapter number is 058.

Program Book Link

The program book is in the works for the 2019-2020 year. Stay tuned!

Monthly Chuckles

Thanks to Ken for this month's jokes:

- Four Laws of Accounting: 1. Trial balances don't. 2. Bank reconciliations never do. 3. Working capital does not. 4. Return on investments never will.
 - Have you heard the joke about the interesting accountant? (No.) Me neither.
-

Open Board of Directors Positions for 2019-2020

Attention Akron chapter IMA members: we are now looking for additional Board members for the next fiscal year. Note that if you serve on the Board for five years, you will qualify for reduced dues as an ELM (Emeritus Life Member) when you retire. Serving as a chapter Board member is a volunteer position that doesn't involve a huge time commitment. If interested in volunteering, please contact Joe Richards at akron@imachapter.org.

CMA Mentoring Program

The IMA Akron Chapter is proud to offer its members a mentoring program to assist CMA candidates with strategies to pass the CMA exam. The IMA Akron CMA Mentoring Program will encourage networking and provide career development opportunities designed to help CMA candidates (mentees) and other members (mentors) in our chapter to form valuable mentoring relationships. The success of this program will rely on volunteers to serve as mentors. Mentoring can take place online, by phone, or in person at Akron chapter events or other locations.

Mentees and mentors will be matched based on the needs of the mentee and the availability of the mentors. The ideal mentor for this CMA focused program would be an individual who has obtained the CMA certification and / or who has recently passed one or both parts of the newer two part CMA exam structure. All individuals who are currently enrolled in the CMA program and studying for the CMA exam are encouraged to enroll as a mentee. In addition, individuals who are undecided about obtaining the CMA certification and would like additional information or guidance are encouraged to enroll.

The CMA Designation - The CMA (Certified Management Accountant) is the advanced professional certification specifically designated to measure the accounting and financial management skills that drive business performance. Achieving the CMA credential demonstrates your mastery of financial planning, analysis, control, and decision support, as well as professional ethics.

If you would like more information, please contact: Jeff Falter at akron@imachapter.org

Internet References

Dinner Reservations, Newsletter articles, Employment service, IMA insurance: akron@imachapter.org

Akron chapter website: akron.imanet.org

IMA Global website: www.imanet.org

Login: enter user name (your IMA account number)

Enter password (last name, unless you changed your password)

Ohio Council website: www.ohio.imanet.org

Access online recording of chapter meetings:

Contact the chapter board members at akron@imachapter.org

Akron Chapter IMA | akron@imachapter.org | <http://akron.imanet.org>