

The Summit Report

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Highlights

Employment News

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

March 2018

Greetings!

Please join your fellow IMA Members for CMA/CFM Night on March 21, 2018 at the HILTON GARDEN INN, 1307 E. MARKET ST., AKRON, OH 44305. **RSVP deadline is Friday, March 16th.**

Check In is at 5:30 pm.

Dinner will be served at 5:45 p.m. sharp. Pre-Technical Session begins at 6:10 p.m. and Technical Session begins at 7:10 p.m.

Cost for Members is \$25.00. Non-members pay \$30.00. **CMA/CFM Members can attend for \$15.00 this month!**

For every Pre-Technical or Technical Session that you attend, you earn 1 CPE towards your CMA or CPA requirements.

Remember, members are always welcome at meetings. Even if you're on a diet or don't feel like eating - come to hear the speakers anyway.... there is NO charge if you are not eating!

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

Thanks!

Kelly Heil

President's Message

Hello IMA Members,

March's dinner meeting will be to honor our chapter's CMAs. The CMA certification is a very prestigious credential to have. I am personally very proud the Akron Chapter has so many CMAs. I will be sending a personal



invitation to each of you to come and be with us in March at a discounted price. We will be hosting Raymond Dunkle, CPA, CFE, CFF, CGMA, President of Red Flag Reporting. Ray will speak to us on two subjects. First, "Spotting Employee Dishonesty - A Guide to Recognizing Deceptive Behavior" will be the topic. Next, Ray will follow up with a session on "Fraud Awareness for Managers and Executives". Do you still need your Ethics CPEs??? If you are a CMA, this is the place to get them. These may or may not satisfy the CPA requirement.

We will also welcome our CSCAs at this meeting!

Many of you have expressed interest in a second tour of Goodyear's Innovation Center Manufacturing facility here in Akron. This is where the race tires are made and it is a very informative tour. If you have interest in this tour, we will be picking a date near the mid or end of April or early May. Let me know if you are interested. It will be in the evening, around 6 pm. I will have more news hopefully at the March meeting with a firm date.

We will also be announcing our Board of Directors for the 2018-19 Akron IMA Chapter year. We have a few slots available if anyone wants to get more involved.

As always, if you have any ideas or suggestions, please let either me or one of the board members know. We want everyone to get the most out of our organization!

See details later on in this newsletter on the upcoming Meonske conference at KSU. There are many CPEs to be had at this conference, as well as good networking opportunities.

Follow us on Twitter for announcements and information [@AkronChapterIMA](https://twitter.com/AkronChapterIMA).

See you on the 21st!

Linda Garrison, President
Akron Chapter IMA
2017/2018

2017/2018 Meeting Schedule

Regular meetings for 2017/2018 will be:
March 21, 2018 - "CMA/CFM Night"
April 18, 2018 - "Past Presidents' Night"
May 16, 2018 "Guest Night"

All monthly meetings will be held at the Hilton Garden Inn unless otherwise indicated above.

For meetings at Hilton Garden Inn check-in at 5:30 p.m., dinner at 5:45 p.m., pretech 6:10 p.m., and tech session at 7:10 p.m.

Pre-Tech Session - "Spotting Employee Dishonesty - A Guide to Recognizing Deceptive Behavior"

Hilton Garden Inn

March 21, 2018

6:10 P.M. (SHARP)

Raymond H. Dunkle, CPA, CFE, CFF, CGMA

President, Red Flag Reporting

"Spotting Employee Dishonesty - A Guide to Recognizing Deceptive Behavior"



Technical Session - "Fraud Awareness for Managers and Executives"

Hilton Garden Inn

March 21, 2018

CMA/CFM Night

Raymond H. Dunkle, CPA, CFE, CFF, CGMA

President, Red Flag Reporting

"Fraud Awareness for Managers and Executives"

Raymond H. Dunkle, II is founder and President of Red Flag Reporting, an Akron, Ohio based company serving clients internationally. Previously, Ray was a Partner/Shareholder with the multi-state CPA firm BCG & Company. His expertise has resulted in recognition as an expert in various courts, including The Supreme Court of Ohio, and appointment as a financial administrator by the United States Bankruptcy Court.

Ray holds five certifications including Certified Public Accountant, Certified Fraud Examiner, Certified in Financial Forensics, Accredited in Business Valuation, and Chartered Global Management Accountant. He earned his B.S. in Accounting (magna cum laude) from the University of Akron in 1991 and his Master of Arts in Ministry (with honors) from Grace Theological Seminary in 2015.

Ray currently holds a Board role at Grace Church of Greater Akron, one of the fastest growing churches in the country. In further contribution to the Akron community, Ray has actively served on at least one board over the last twenty-five consecutive years. His roles have included President of Child Guidance & Family Solutions, President of the University of Akron National Alumni Board, Treasurer of the Summit County Chapter of the American Red Cross, among others. His occupational and community efforts have earned Ray several awards including the 2007 "30 for the Future" award from the Greater Akron Chamber and the 2016 "Dr.

Frank L. Simonetti Outstanding Professional Alumni Award" from the University of Akron's College of Business Administration.

Ray is the lead author of the book "Corporate Fraud: The Executive's Survival Guide" and a contributing author to the book "Make the Leap" (Genevia Gee Fulbright, CPA). He has also been published and/or quoted in various journals, including "Accounting Today" and "The Practical Accountant." Ray is a frequent speaker and has presented at the national and international levels.

Ray's greatest joys in life are his wife Tanya, his son Andrew and his daughter Allison.

Come to a Board Meeting

If you would like to go behind the scenes and learn what it takes to put on a monthly tech session meeting and run the chapter, consider coming to a Board meeting. The chapter meets at 6 PM on the last Wednesday of the month at Mr. G's Pizzeria, 2955 W. Market Street, Fairlawn 44333 (330-836-1111), except as follows: no meeting in November, December meeting earlier in the month, meeting on Saturday morning in June, occasionally earlier than the last Wednesday if there is a conflict with monthly closings of employers. Here are the remaining meetings this fiscal year - March 28, April 25, and May 30. Free pizza and soft drinks; see your Board leaders in action.

Meonske Professional Development Conference

Save the dates!

44th Annual Professional Development Conference, Institute of Management Accountants, Ohio Council at Kent State University. Cost is \$180 per day, \$130/day for Educators, \$50 late fee after April 16. Brochures coming in the mail soon.

THURSDAY, April 26, 2018 CONFERENCE (8 hours CPE)

"Recent Developments and Critical SEC Updates"

Timothy F. Gearty, Partner, Gearty & McIntyre LLP, National Director & Editor-in-Chief, Becker CPA Review Course Professional Program

"Cybersecurity Panel"

Robert Boutell, Chief Information Security Officer, Alliance Data
Andrew Retrum, Managing Director, Protiviti Inc.
Martin Bally, VP & Chief Security Officer, Diebold Nixdorf
John Bingham, Former Chief Information Security Officer, Delphi Automotive

"Obtaining Positive Results by Using Conflict Management to Your Advantage for WIN WIN Results"

Timothy F. Gearty, Partner, Gearty & McIntyre LLP, National Director & Editor-in-Chief, Becker CPA Review Course Professional Program

KEYNOTE LUNCHEON SPEAKER

"How the CMA and Related Learning Enhances Personal Brand and

Professional Reputation"

Jeffrey Thomson, President and CEO, IMA

Concurrent Track #1 - "Successful Leadership with Multi-Dimensional Finance Transformations"

Gabe Zubizarreta, CEO and Founding Principal, Silicon Valley Accountants
J. Stephen McNally, IMA Global Board of Directors

Concurrent Track #2 - "Ethics in Action - How to Shine in an Unethical World"

Jeffrey Bissell, CFO and Treasurer, NMG Aerospace

"Professional Standards & Responsibilities - Accountancy Board of Ohio-Approved Ethics"

Norman R. Meonske, Professor Emeritus, KSU

FRIDAY, April 27, 2018 CONFERENCE (8 hours CPE)

"Financial Reporting Panel, Accounting Standards Update"

Moderator: Dennis R. Beresford, Executive-in-Residence, J.M. Tull School of Accounting, University of Georgia, and former chairman of the FASB
James I. Kroeker, Vice Chairman FASB
Wesley R. Bricker, Chief Accountant, SEC
Wayne Carnall, Partner in National Professional Services Group, PricewaterhouseCoopers, and former Chief Accountant, SEC

Keynote Luncheon Speaker: "Disruptive Technology - The Next Big Thing that will Change Everything"

Michael Capellas, Founder & CEO Capellas Strategic Partners

"Internal Controls and Sustainability Reporting - Good for Business"

Jeffrey C. Thomson, President & CEO, IMA
Robert H. Herz, Board member of Sustainability Accounting Standards Board Foundation, and former chairman of the FASB
Robert B. Hirth, former Chairman of COSO (2013 - January 31, 2018), and Senior Managing Director, Protivity

Concurrent Track #1 - "The Digital Workforce: Robotic Process Automation and Process Analytics in Accounting"

Evan Campbell, Managing Director, Protivity's Technology Strategy
Casey Poon, Associate Director, Protivity's Business Improvement

Concurrent Track #2 - "Women's Panel"

Sandra Richtermeyer, Dean, Manning School of Business at UMass, Lowell
Laurie Brias, Chair of the Board, Perrigo Company
Melissa Anezinis, Executive Director, J.P. Morgan Asset Management
Mary Hogue, Associate Professor, College of Business, KSU

Board of Directors Slate for 2018-2019

Attention Akron chapter IMA members: we are now looking for a few additional Board members for the next fiscal year (Board position marked "**OPEN**" below). 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 Linda Garrison at Linda_Garrison@goodyear.com. The following chapter members are nominated for and will stand for election to the 2018-2019 Board of Directors at the March 21 chapter meeting:

- President - Joe Richards
- VP Finance & Administration - Jeff Falter
- VP Education & Speakers - Yelena Kemp
- VP Communications & Community Relations - Kelly Heil
- VP Membership - Ken Bechtol
- Treasurer - Shirley Calvin
- Secretary - Christine Niswender
- Chair Audit Committee - Chris Reed
- Chair Nominating Committee - Linda Garrison
- Director, Insurance - Roy Howarter
- Director, Speaker Archives - Linda Simko
- Director, Employment - Bob Shapiro
- Director, CMA & CFM Programs - Linda Garrison
- Director, Speakers - Christine Niswender
- Director, Technical & Board Meeting Facilitation & Attendance - Jeff Falter
- Director, Librarian - Linda Garrison
- Director, PD Session - **OPEN**
- Director, Program Booklet - Roy Howarter
- Associate Director, Program Booklet - Ken Bechtol
- Director, Advertising - **OPEN**
- Director, Corporate & Academic Development - **OPEN**
- Director, Public Relations - Joe Richards
- Director, Special Activities - **OPEN**
- Director, Member Attendance - Jeff Falter
- Associate Director, Member Attendance - Billy Dryer
- Director, Member Relations - Jeff Falter
- Director, Retired Professionals - Wayne Hawkins
- Director, Student Relations - Wendy Tietz
- Coordinator, KSU - Wendy Tietz
- Coordinator, UA - Il Woon Kim
- Coordinator, YSU - Ray Shaffer
- Co-Coordinator, YSU - David Law
- Director, Chapter Awards - Linda Garrison
- Director, Newsletter - Kelly Heil
- Webmaster - Linda Garrison
- Co-Webmaster - Kelly Heil

QuickBooks Online Assistance needed

I'm looking for someone to perform invoicing functions on a part time basis -approx 15 hours a week - in Quickbooks Online for my husband's company which provides maintenance and janitorial services for restaurants. Please have interested parties contact me via email (robinmarshall89@gmail.com) or at the number below.

Thank you,
Robin
Cell: (330) 310-0545

Death of a Long-Time IMA Member

ELA **Kurt Ottiger** died on 2-12-18 at age 93. He joined IMA on 1-1-60. Kurt was born in Lucerne, Switzerland, served in the Swiss Air Force during WWII, graduated from the University of Geneva, Switzerland, and later the University of Akron with a degree in International Finance. He came to the US in 1948 and lived at the YMCA while working as a dishwasher at Portage Country Club. He retired from National City Bank as VP of International Banking with 30 years of service. He was Past President of the North American Swiss Alliance, Akron Swiss Society, Fairlawn Kiwanis Club, and Copley-Fairlawn School Foundation. He is survived by two daughters and two grandsons. We thank Kurt for his long membership in IMA and will miss him.

Annual Program Book Update

The Board of Directors has decided to stay with the pdf online format of the Annual Program Book and, thus, hard-copy Annual Program Books will not be mailed to members with email addresses. Instead, members can view/download the book from the website address www.Yodergraphics.com/ima/2017_ima_roster.pdf. The password is "ima 2017". The website was accessible after October 1. Members without an email address were snail-mailed a hard-copy Program Book. Members who attended the September 20 tech session meeting at the Hilton Garden Inn also received a Program Book. If you need a hard-copy of the Annual Program Book, please contact Linda Garrison at Linda_Garrison@goodyear.com.

CMA Mentoring Program

The Akron chapter IMA is proud to offer its members a mentoring program to assist CMA candidates with strategies to pass the CMA exam. The Akron IMA 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.

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.

The CMA credential is:

Focused - On the critical skills you use in business

Respected - Leading employers seek to hire and promote CMAs

Valued - CMAs on average, earn higher compensation than noncertified professionals

Convenient - CMA exams are offered electronically in hundreds of locations worldwide.

The CMA Mentoring Program - The accreditation process leading to the CMA designation can be a rigorous experience requiring great energy and effort. The CMA candidate will have questions regarding exam content, study materials, test taking

strategies, and much more. Without somebody to guide and mentor them, the candidate may become discouraged and abandon the certification program. However, through the Akron IMA CMA Mentoring Program, candidates will be able to seek and obtain the support and guidance of fellow chapter members who have earned their CMA designation.

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.

If you would like more information, please contact: Jeff Falter jfalter@roadrunner.com

Internet Reference Page

Dinner Reservations: imadinner@hotmail.com or (330) 904-7986

Newsletter articles: ima_newsletter@yahoo.com

Employment service: rshapiro@socius1.com or (330) 703-9195

IMA insurance: R_Showarter@hotmail.com or (330) 688-7670

Akron chapter website: akron.imanet.org

IMA National 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

Online Program Book: www.yodergraphics.com/ima/2017_ima_roster.pdf

Password is ima2017

Access online recording of chapter meetings:

Contact Roy Howarter at (330) 688-7670 or R_Showarter@hotmail.com

Get the password from Roy

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