

IMA Kansas City Chapter

October 2023 Newsletter

Register Now!

**October 26, 2023
- October 27, 2023**

Annual October Continuing Professional Education Conference

				THURSDAY	FRIDAY
				26	27
7 AM				IMAKC CPE Conf. register/breakfast CBIZ Garage parking 700 W. 47th St., #1100 KCMO	IMAKC CPE Conf. register/breakfast CBIZ Garage parking 700 W. 47th St., #1100 KCMO
8				Making the Move at Work and Beyond Renee Rogers, KUMC	AI / Digital Transformation David Losacco, CBIZ-Stinnett
9				Current topics in compensation and benefits Joe Rice, CBIZ	
10					Cybersecurity Shannon McMurtrey, Drury Univ.
11				Capital Markets Transactions & Private Equity Considerations Emily Matthews, Deloitte	Leadership Adrian James, Park Univ.
12 PM				Networking lunch Lunch provided	Networking lunch Lunch provided
1				Topic to be announced RGP	Become the Everyday Ethicist Amanda "Jo" Erven, Accounting Consulting Education
2				Many Hats of the Small Business CFO Steve McNally, Former IMA Global Chair	Economic Macro Update Chris Kuehl, Armada Corporate Intelligence
3				Tax Update Jim Still, FORVIS	Economic Micro Update Chris Kuehl, Armada Corporate Intelligence
4				Networking Reception CBIZ (700 W. 47th St., Ste 1100, KCMO)	
5					

Registration perks

- ☒ up to 16 hours CPE
- ☒ free parking
- ☒ networking
- ☒ food provided

<https://KansasCity.IMAnet.org/events>

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The Association of
Accountants and
Financial Professionals
in Business

KANSAS CITY CHAPTER

The IMA Kansas City Chapter invites you to our
**October Continuing Professional
Education Conference**

Thursday, October 26th and Friday, October 27th

Earn up to 16 hours of CPE

The IMAKC Chapter is hosting 2 days and 16 hours of CPE and networking and are pleased to announce that our conference will be located at the CBIZ offices on the Kansas City Plaza (700 West 47th Street - parking available in the CBIZ office building). Special pricing is available for educators and 4-hour sessions. Students may attend any session for free. Here is a preview of our speakers:

Renee Rogers, Senior Scientist, University of Kansas Medical Center: Renee is a Senior Scientist at the University of Kansas Medical Center in the Division of Physical Activity and Weight Management and is a Fellow of the American College of Sports Medicine. She researches, educates, and creates programs to help people build healthy behaviors into their lives.

Joe Rice, Director, Compensation Consulting, CBIZ: Joe manages a team of consultants and directs research and analysis activities for CBIZ so will offer insights from his extensive experience in compensation and benefits.

Emily Matthews, Senior Manager, Deloitte: Emily is a Senior Manager – Accounting & Reporting Advisory in Deloitte's Denver office, where she focuses on capital market transactions. Emily's presentation will cover Special Purpose Acquisition Companies (SPAC) and the IPO markets. SPACs raise capital through IPOs for the purpose of acquiring existing companies.

Steve McNally, Former IMA Global Chair and CFO, PTI Group of Companies: Steve is recognized for expertise in governance, risk management, and internal control. His global experience includes offshore assignments, leading cross-country initiatives, and roles on nonprofit boards. He will discuss the many roles of a small business CFO.

Jim Still, Tax Partner, FORVIS: Jim will provide an update on a variety of tax issues and legislation. He serves as director of Forvis' Kansas City office, where he provides tax compliance and consulting services for businesses and specializes in partnership taxation. Jim is a member of the AICPA and the Missouri Society of Certified Public Accountants.

Shannon McMurtrey, Associate Professor of Cyber-Risk Management, Drury University: Shannon brings over 25 years of IT experience in the fields of e-commerce, health care technology, and cybersecurity as the founder and co-founder of three companies currently operating in those areas.

David Losacco, Managing Director, CBIZ: David is the Business Process and Information Technology controls lead for CBIZ RAS and responsible for both BP and IT audits and services provided to clients across all industries.

Amanda "Jo" Ervin, President and Founder of Audit. Consulting. Education. LLC: Jo is a licensed CPA (CO), CIA, CFE, CTQA, and CVP, specializing in internal audit strategies and ethics in corporate culture. She is a full-time, accounting faculty member at Metropolitan State University of Denver as well as the Director of Internal Audit Education for the University.

Chris Kuehl, economist, Armada Corporate Intelligence: Chris is a favorite speaker among the accounting and financial community on local, regional, national, and international economic topics. He has done presentations in all fifty states and is a frequent speaker at IMA and state CPA society events.

Register via EventBrite

<https://www.eventbrite.com/e/annual-autumn-continuing-professional-education-conference-tickets-713234502597?aff=oddtcreator>

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CAREER OPPORTUNITIES

IMAKC sponsors an online Job Board at
<https://KansasCity.IMAnet.org/AboutChapter/JobBoard>
for the benefit of our members.

Please email us with your open positions.

Tax Auditor/Analyst

Revenue Division of the Municipality of Kansas City, Missouri

Come work for the employer just named one of three Best Places to Work in Local Government for 2022 by ELGL! The city Finance Department prides itself on delivering the best service and outcomes to citizens externally and city departments internally. Current open finance-related positions:

Plans, organizes, and conducts office and field audits of the tax returns, reports, and records of business organizations. Examines accounting documents to verify the accuracy of computations and to ascertain that transactions and computations are properly supported, are in accordance with pertinent policies and procedures, and are classified and treated according to established reporting requirements. Prepares working papers, schedules, exhibits, and summaries indicating the extent of examination in presenting and supporting the findings and recommendations. Prepares complex financial analyses and conducts legal, accounting, and auditing research. Answers inquiries pertaining to accounting and auditing laws, rules, policies, and procedures and advises the business organization of results of audits and recommendations for ensuring conformity to local tax laws.

For further details, visit <http://www.KCMO.gov/careers>.

Director of Finance

CBIZ | EFL Associates is excited to partner with DCCCA in search for a Director of Finance to lead all financial operations, forecasting, budgeting, and reporting. The Director will work closely with the CEO, COO, management team and Board of Directors, to establish strategic goals and objectives and generate tactical plans of implementation for financial improvement. Leading and partnering with others, the Director will collaborate across the agency to optimize and improve financial performance. DCCCA is a private, non-profit organization providing a full suite of social and community services with a mission of improving the safety, health, and well-being of their clients. Located in Lawrence, Kansas, DCCCA has one of the best reputations in the state of Kansas for providing high-quality residential and outpatient treatment services, along with foster care prevention and placement services.

For further details, contact Sarah.Clark@EFLAssociates.com.

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Controller

The Controller assists the Director of Finance with operating and accounting procedures to ensure accurate and reliable data necessary for effective business operations. A primary focus will be continuing the implementation processes associated with the accounting and financial reporting system that will increase efficiencies, provide more timely information for budget decisions, and promote cross department collaboration on financial processes. In addition to day-to-day accounting functions, including accounting and finance staff supervision, the Controller maintains DCCCA's accounting policy and procedure manuals and an effective system of internal controls for the accounting and financial functions of the agency. The Controller demonstrates the highest level of ethical behavior and maintains the confidentiality of all sensitive information related to DCCCA's operations and customer records.

For further details, contact Sarah.Clark@EFLAssociates.com.

Accountant

INDATEL is seeking a full-time Accountant. The ideal candidate will adhere to and embrace INDATEL Services' company values: Accountability, Customer-Focused, Embrace Culture of Change, Exceed Expectations, Integrity, Listen & Understand, Respect for Others, Teamwork / Collaboration, Value People First, "We Care". This position is responsible for a variety of entry and intermediate-level accounting and financial duties in support of the overall fiscal activities of the organization. This position reports to the Vice President - Finance and Accounting and involves regular collaboration with Executive Team in addition to Sales, Business Development and Operations/Engineering departments. Work is often performed independently with review by the Vice President - Finance and Accounting. The candidate must have strong interpersonal skills and a strong business acumen.

Responsibilities:

- Perform financial processes which may include but are not limited to accounts payable, accounts receivable, revenue recognition, journal entries, bank reconciliations, fixed assets, and payroll.
- Create Board ready financial statement and ad-hoc reports for various business purposes.
- Work proficiently in the Quick Books Online financial system, including producing financial reports, data extraction, budget, and analysis along with use of other technology tools used in support of INDATEL's financial and organizational work.
- Contribute to the preparation of applicable monthly/quarterly state tax filings including completion of month- and year-end accounting records, adjusting journal entries, audit reconciliations, and schedules.
- Assist with completion of biweekly payroll, benefits process, benefit updates, and salary changes, including awareness of internal policies and governing regulations such as FLSA and tax issues.

Qualifications:

- Education: Bachelor of Science Degree in Finance, Accounting, or closely related field. Equivalent combinations of education and experience will be given adequate consideration.
- Experience: 3+ years recent experience in an entry or intermediate-level accounting role. Experience in Telecommunications preferred but not required.
- Competencies: Knowledge of generally accepted accounting principles (GAAP), specifically statements issued by the Governmental Accounting Standards Board (GASB). Ability to prepare, interpret, and analyze financial statements and operational schedules and reports.

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- Fluency in Microsoft Office suite (Outlook, Excel, Word, PowerPoint, etc.).
- CMA (Certified Management Accountant) preferred but not required.
- Valid driver's license

The above statements are not an exhaustive list of job responsibilities of this position at INDATEL Services.


For further details, visit <https://indatel.com/careers/accountant>.



Are You Eligible for a **CMA** Scholarship?

- Ask your professor to nominate you! IMA accepts up to 10 students per school per academic year
- Pursue the CMA at no cost with the scholarship (including: IMA membership, CMA entrance fee, and exam preparation materials)
- Take the exam while still in school

Stand out and gain a competitive edge as you graduate!



IMA's Certification for
Accountants and
Financial Professionals
in Business

Learn more at www.imanet.org/cmascholarship
and speak to your professor

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DE&I Leadership Experience

IMA Global is offering a small group of select diverse and underrepresented professionals a unique opportunity to experience and impact IMA's diversity, equity, and inclusion (DE&I) efforts through a first-hand look into the inner workings of our DE&I Committee. This will be a commitment from January to June 2024 and will provide:

- Award of the DEI practices certificate of the IMA free of cost to the participant, subject to the participant satisfying the proficiency requirements of the certificate.
- Be mentored by an IMA volunteer leader.
- Participate as a presenter and/or as a moderator in the IMA Leadership Academy (IMALA) Spring webinar on a diversity topic.
- Engage in periodically scheduled virtual activities, including meetings with the DEI committee, IMALA committee, and IMA's Sustainability Management Committee, and contribute as necessary.
- Learn the inner workings of volunteer governance.
- Gain valuable leadership experience and be recognized as a future leader of the IMA.
- Attendance at an IMA community event in your region. IMA will cover travel cost to that event.

Applications must be received by 11:59 p.m. EST on October 31, 2023.

Applications will be reviewed in November 2023. Selected individuals will be notified by December 1, 2023.

For details, visit <https://www.imanet.org/Career-Resources/Volunteering-with-IMA/DEI-Leadership-Experience>.

IMA Kansas City Board of Directors Service Year 2023-2024

President	Mr. Ralph Rogers
VP Continuing Education	Mr. Robert Swisher
VP Engagement	Dr. Kimberly Church
VP Communications/Webmaster	Ms. Lynn LeCount
VP Administration	Mr. Andrew Garrelts
Treasurer	Mr. Steve Platt
Secretary	Mr. Zack Beyer
Director	Dr. Gail Hoover King
Director	Mr. Joseph Lohman
Director	Mr. Steven Croft
Director	Mr. Sherburne Dunn
Student Board Member	Ms. Lauren Leners
Student Board Member	Ms. Megan Townsend
Student Board Member	Ms. Stacy Santos
Student Board Member	Mr. Sean Moore

If you are interested in becoming a Board Member, please do not hesitate to reach out to IMAKCchapter@gmail.com. We are always excited to share details and expand our team!

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