

# THE READ INK

A Publication of the East Bay-Northern California Chapter of the IMA

## President's Message

### East Bay Chapter Members and Friends,

Happy New Year!

Thank you to everyone who made the 2018-2019 year so successful! It was an exciting year indeed as IMA celebrated its 100-year anniversary and our chapter (through much hard work) finished 3rd in the Warner division competition. Now, we look to carry that momentum forward in to the new (2019-2020) IMA year. This month gives traction to that momentum as our chapter's annual planning meeting will take place in a few weeks. Many of the relevant programs, products, and services that we offer to our members each year are the result of the annual planning meeting we have. It all starts with our Strategic Goals, which are:

- **Win additional market share with "CMA First"**
- **Drive member retention by delivering tangible value through relevant programs, products, and services**
- **Raise awareness in the Student/Academic market to expand the membership pipeline and reach the young CMA certified professionals of tomorrow**
- **Master Technology that directly impacts IMA members and our value proposition**

Using these as our guiding light, we then have insightful and creative discussion around how to best achieve these goals. Germinating from this are the activities we will engage in each month moving forward to deliver the value we as members expect. It requires unwavering commitment and coordination on behalf of our Board and the many volunteers that help. Thank you again to all that help make IMA the success it is. Here's to another great year in 2019-2020!

Mike Gorski, President  
IMA East Bay – Northern California chapter  
2018-2019

[www.imanet.org](http://www.imanet.org)

CMA® | You've got to earn it.

## Latest Information

### Congratulations EB-NC Chapter



(Continued on page 2)



The Association of  
Accountants and  
Financial Professionals  
in Business

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## IMA's Vision

Be the resource for developing, certifying, connecting, and supporting the world's best accountants and financial professionals within businesses

## IMA's Mission

Provide a forum for research, practice development, education, knowledge sharing, and the advocacy of the highest ethical and best business practices in management accounting and finance

## IMA's Strategic Goals

- Win additional market share with "CMA First", an aggressive pipeline building effort and expansion of the CMA® in the U.S. and globally
- Drive member retention and loyalty in all regions by delivering tangible value through relevant programs, products, and services
- Raise awareness in the Student/Academic market to expand the membership pipeline and reach the young CMA certified professionals of tomorrow
- Master Technology that directly impacts IMA members and our value proposition

# East Bay - Northern California

## Latest Information (cont.)

(Continued from page 1)

### About EB-NC

The Chapter was chartered July 1, 1966 as Alameda County – South Chapter (#207) with a charter membership of 82. In 1990, the Chapter went through a reorganization, moving its meeting locations and changed its name to Amador Valley. The new name reflected the new geographical location (South Contra Costa County and South Alameda County) of chapter members and meetings.

On July 1, 2014, the Amador Valley Chapter and the Oakland - East Bay Chapter merged. The Merged Chapter retained the Oakland - East Bay Chapter Number for historical significance. The Merged Chapter is named the East Bay - Northern California Chapter as there was an historical East Bay Chapter in IMA history and our members are located in Western and Southern Contra Costa County and Alameda County.

East Bay - Northern California Chapter: 3rd place, Warner Division, Brinkley Award  
East Bay - Northern California Chapter: Outstanding Level of Service  
East Bay - Northern California Chapter: Gold (W) Chapter Website Award  
Central California Chapter: Current Membership, Member Growth (W)

### Congratulations

Congratulations to the Chapter Members who received their CMA's and CSCA's this year!

- Ms. Ying Zhao, CMA on receiving her CMA on August 23, 2018
- Mr. Jonathan Fisher, CMA on receiving his CMA on May 17, 2019

### MEMBERSHIP HACK: CHAPTER MICROSITES

The Institute of Management Accountants uses microsites that chapter volunteers manage to drive online member engagement while maintaining IMA brand consistency. The sites are easy to configure and help boost event attendance. [Read more](#)

### Informational Articles to Assist Your Career!



#### **Is it time to make a job change? The 5 things to ponder.**

There are days when we are working and we think – get me out of here – I need a new job! Those thoughts may come out of frustration, boredom, drive, etc. Here are five key items to consider before beginning your job hunt.

**Purpose.** On a day to day basis, do you feel like you are contributing in your role? Do you feel needed? Do you feel like you make a difference?

**Perception.** Are you recognized? Do you feel that people appreciate the work you are doing? Do you receive positive reinforcement for your efforts?

**Progress.** Are you on track in your career? Are you learning new things? Is your work challenging you?

**People.** Do you like the people you work with? Do you feel engagement from your boss? Are you growing in your work relationships?

**Prepare.** Are you prepared to let go of your current role/company? Do you think the timing is right to move on? Can you handle the humble feeling when you start somewhere new?

A job change is a major life event (stressor). There is typically a defining moment when you reach the point of wanting to make a change. The key is to take the time to think through the pros and cons of changing roles. Whether you stay or whether you go ... keep your focus on your purpose, perception, progress, people and preparing.

Tricia Scalzo: June 18, 2019



Robert Half (Accountemps) has provided the following articles on "Senior Managers Point Out Behaviors to Avoid During the Dog Days of Summer". [Link](#)

If you come across an article or would like to submit an article that is of added value to one's career, please forward to the Webmaster.

# East Bay - Northern California

## Still Looking for Members to Serve on the Chapter Board of Directors

The East Bay - Northern California Chapter of the IMA is still seeking qualified members to serve on EB-NC's Board of Directors, with terms beginning on July 1, 2019. These esteemed volunteers have the crucial responsibility of overseeing the strategic direction of the local organization and its policies and procedures; monitoring the Chapter's financial health and committee activities; and supporting IMA's and EB-NC's mission, vision, and values.

By serving on the Chapter Board, you can become an active participant in setting IMA's and the local Chapter's agenda, advance and impact the management accounting profession, and represent IMA by working with external organizations and industry stakeholders.

You can also nominate another member you feel would be a qualified candidate for the Chapter's Board.

The Chapter has many Leadership Positions available from a large role to a smaller role.

**Time Commitment:** Approximately 7-10 hours a month. The current Board of Directors and IMA's professional Community Relations team will help you succeed in your efforts by providing training, support, and guidance.

**Benefits of Serving:** Build leadership skills that you will need to advance in your career and be part of empowering the profession and helping others achieve their professional goals.

**Requirement to serve:** Be an IMA member in good standing, have high ethical standards, and able to work collaboratively with others.

We hope you will consider this exciting opportunity to serve IMA and broaden your leadership!

If you have an interest and willingness to serve and help deliver IMA's mission in your community, we encourage you to contact:

Mike Gorski, EB-NC President at [eastbaync@imachapter.org](mailto:eastbaync@imachapter.org), or

Robert Hulin at [ima.eastbay.nc@gmail.com](mailto:ima.eastbay.nc@gmail.com).

### ***2019-2020 East Bay—Northern California Chapter Board of Directors:***

Mike Gorski	President
Mike Gorski	Past President
(Open)	Vice President of Administration
(Open)	Director of Competition
Robert Hulin	Treasurer
Pankaj Pandey	Director: Investment Committee
William Sawyer	Director: Investment Committee
Chung Bothwell	Director: Investment Committee
(Open) Mike Gorski (Acting)	Secretary
William Sievers	Vice President of Membership
(Open)	Director: Member Relations
(Open)	Vice President Communication
(Open) Robert Hulin (Acting)	Webmaster
(Open) Robert Hulin (Acting)	Director: Newsletter Director
Chung Bothwell	Director: Community Services
Kevin Clancy	Director: Social Media
Sheela Chandrasekhara	Vice President of Professional Education
William Sievers	Director: CMA Program
Tricia Scalzo	Director: FMN Program
(Open)	Director: Ethics Program
(Open)	Director: Excel Program
(Open)	Director: Technical Meetings
Ken Shepard	Vice President of Young Professionals and Students
Brian Carlson	Director of Student Services
Sherry Morse	Director at Large (Advisory only)

# East Bay - Northern California

## Chapter Calendar

<u>Date</u>	<u>Event</u>	<u>CPE</u>	<u>Time</u>	<u>Location</u>
<b>2019</b>				
02 Jul	Emotional Intelligence	1.5	10:00 AM	Leadership Academy
13 Jul	Financial Management Network	4.0	9:00 AM	ConXTech, Pleasanton, CA
17 Jul	From RPA to AI – Understanding the Future of Technology for Accounting	1.0	10:00 AM	Inside Talk
18 Jul	EB-NC IMA Board Meeting and Planning Session	0	5:30 PM	ConXTech, Pleasanton, CA
20 Jul	New Employment Law	2.0	10:00 AM	Pleasant Hill, CA
24 Jul	Becoming a Data-Driven Finance Leader	1.0	10:00 AM	Inside Talk
27 Jul	Dashboards, Charts & Graphs	2.0	9:00 AM	TBA
14-16 Nov	IMA's Student Conference			Charlotte, NC
<b>2020</b>				
27-29 Feb	REST 2020	22		Reno, NV
15-19 Jun	IMA's Annual Conference & Expo	30+		Atlanta, GA

## East Bay—Northern California Board Meeting

The East Bay Northern California usually holds a virtual Board Meeting on the Third (3rd) Thursday of the Month. As the Chapter Board values all members input regarding activities the Chapter is in, all Chapter Members are invited to these virtual meetings. During each meeting we discuss how the Chapter can support our members in accomplishing their goals and strategies

July 18, 2019: 5:30 PM to 9:00 PM

**This Board Meeting will be a short 2018-2019 Wrap-Up Board Meeting with a following 2019-2020 Planning Session**

**All IMA Chapter Members are invited.**

**Please notify Mike Gorski in advance at [eastbaync@imachapter.org](mailto:eastbaync@imachapter.org) if you would like to attend as space is limited.**

Please join us from your computer, tablet or smartphone at:

Join Zoom Meeting

<https://zoom.us/j/5628614823>

One tap mobile

+16699006833,,5628614823# US (San Jose);

+14086380968,,5628614823# US (San Jose)

Dial by your location

+1 669 900 6833 US (San Jose);

+1 408 638 0968 US (San Jose);

+1 646 876 9923 US (New York)

Meeting ID: 562 861 4823 .

# East Bay - Northern California Education

## Financial Management Network

July 13, 2019: 9:00 AM to 1:00 PM

Continuing Professional Education: 4.0 Hour CPE



One of the most valuable products offered by the Institute of Management Accountants. The FMN (Financial Management Network) is a live DVD training program introducing and explaining up-to-the-minute accounting and finance issues. By viewing the DVD and participating in the group discussion you will earn four hours of CPE credit.

Overall, the program allows you to keep current with the changes and impacts in many facets of the Accounting and Finance industry.

Location: ConXtech, Inc. Headquarters  
6701 Koll Center Pkwy, Suite 150  
Pleasanton, CA 94566 Time: 9:00 am to 1:00 pm

Cost: \$40.00 members / Non-members  
Full breakfast and lunch included in cost  
Registration: [Tricia Scalzo](#)

Sponsored By:



## Certification

### CMA (Certified Management Accountant) Certification Exam to Be Updated With an Increased Focus on Technology in January 2020

ICMA® (The Institute of Certified Management Accountants), the certification division of [IMA](#)® (The Institute of Management Accountants), announced that it is making changes to its CMA® (Certified Management Accountant) exam. The updates to the exam are being made to ensure the CMA remains relevant in the ever-evolving environment of the management accounting profession. The changes will be effective January 1, 2020.

The new CMA exam will be changed in both parts but remain a two-part exam. Each part will be a four-hour test with 100 multiple-choice questions and two essays. IMCA is saying that what will change is some of the content:

- Part 1 of the exam will contain a new section called Technology and Analytics. This section, which will comprise 15% of Part 1, will test new topics like information systems, data governance, technology-enabled finance transformation, and data analytics. To accommodate this new material, content from other sections will be reduced. Part 1 of the exam will also have a new title: "Financial Planning, Performance, and Analytics."
- Part 2 of the exam will also be revised and include greater emphasis on ethics and strategic decision making. It will have a new title as well: "Strategic Financial Management."

The Strategic Finance Magazine has an article "[KEEPING THE CMA RELEVANT](#)" which provides background on why the CMA Exam is changing.

These are the topics deleted from test

- \* Internal auditing
- \* Off balance sheet financing
- \* Tax implications of transfer pricing
- \* Real options

[\(More Information\)](#)

# East Bay - Northern California Education

## Certification (cont.)

### Final testing window for current CMA exam

The upcoming September/October testing window is your final opportunity before the new exam, [CMA 2020](#), takes effect next January. Boost your career outlook by [enrolling](#) in the CMA® (Certified Management Accountant) program today.

The CMA requires commitment and hard work, but the process is very manageable. Did you know that it takes only 12-18 months on average to complete the CMA program? Career growth and better earning potential are closer than you ever imagined.

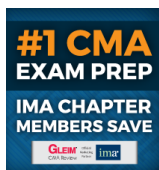
Watch this "[How to become a CMA](#)" video to see how to manage the path to getting certified.

### How does OBTAINING A CMA CREDENTIAL benefit you ?

- Why pursue the CMA?
- What are the benefits of getting it?
- How should one prepare for the examination?
- What is the outline of the test and what do sample questions look like?

The find out the answers to these questions and more, please look for our future announcement on attending the GoToMeeting Presentation . If interested please contact [William Sievers](#).

## Gleim Study Materials



The East Bay Northern California IMA Chapter has partnered with Gleim to ensure your success on the CMA exam!

Almost 40 years ago, Gleim set the standard for CMA exam review. Today, as an industry leader and IMA Strategic Partner, Gleim continues to dedicate itself to preparing candidates to pass quickly and confidently. The 2019 Gleim CMA Review includes thousands of the most realistic CMA exam questions, the most comprehensive coverage, dedicated and reliable support, and more. IMA chapter members can save up to 25% on Premium CMA Review System.

To place order directly members can go online by going to [gleim.com/IMAEBNC](http://gleim.com/IMAEBNC) or contact [Alexandra Graham](#) at 800.874.5346 ext. 428 or [imachapters@gleim.com](mailto:imachapters@gleim.com) to learn about the significant discounts you are eligible for as an IMA Chapter member

Premium Review System (SET): \$1,249.00 retail and \$936.75 with the 25% IMA Chapter Discount  
Premium Review System (PART): \$750.00 retail and \$562.5 with the 25% IMA Chapter Discount  
Traditional Review System (SET): \$1,049.00 retail and \$891.65 with the 15% IMA Chapter Discount  
Traditional Review System (PART): \$625.00 retail and \$531.25 with the 15% IMA Chapter Discount  
CPE is 15% off of 20 hours or more



IMA's Certification for  
Accountants and  
Financial Professionals  
in Business

The CMA (Certified Management Accountant) is the advanced professional certification specifically designed to measure the accounting and financial management skills that drive business performance. To find out more from IMA click [here](#).



Certified in Strategy  
and Competitive  
Analysis

The CSCA™ (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® (Certified Management Accountants) certification. To find out more from IMA click [here](#)

# East Bay - Northern California Education

## Microsoft EXCEL 2010 Microsoft Excel Presentations



The Chapter continues its outreach program to our members by offering a one hour in-house Excel training session free. This is a benefit for the East Bay - Northern California Chapter membership. The Chapter member may include company associates, outside associates, and other guests.  
Session Criteria:

Interested: Contact John Hallett at [eastbaync@imachapter.org](mailto:eastbaync@imachapter.org). This is a member benefit to you as an active EB-NC Chapter member

### Consider Taking the Microsoft Excel Expert 77-728 Test!

I just took the Excel Expert 77-728 Exam. I flunked 1st time and got the minimum score of 700 on the makeup exam. Needless to say: It is a tough exam.

My Study Material included:

G-Metrix Test Program: [GMetrix Link](#).

The official Microsoft MOS 2016 Study Guide 77-728 Paul McFedries [Amazon Link](#)

An essential support tool for the MOS book is a series of YouTube videos by Carshalton Advisory .

The Carshalton YouTube site details each practice task objective question in the entire book. [Carshalton Link](#)

Please feel free to contact me to further discuss the exam. John Hallett at [eastbaync@imachapter.org](mailto:eastbaync@imachapter.org).



## Ethics Courses

The Chapter is looking forward to engaging members in the future with additional Ethics Case Studies that IMA offers:

### IMA Case Studies:

- Blinded by Pressure (Chapter has purchased this course)
- The Slippery Slope of Greed
- Misplaced Trust / Devastating Fraud
- The House Out of Control

### Individual Ethics Courses:

- Blinded by Pressure
- The Slippery Slope of Greed
- Whistleblowers Wanted
- When Silence Is Not Golden
- Earnings Management and a Case of Ethics
- Corporate Ethics: From Policy to Practice
- Misplaced Trust / Devastating Fraud
- Web of Deception
- A Pathway to Excellence
- A Prescription for Prevention
- Embracing Ethics
- House Out of Control

Individual IMA Members may order these courses online from the IMA Course Catalog [here](#).

If any member is interested in attending (or even presenting) one the above Facilitator Led Case Studies courses, please contact [Mike Gorski](#).

# East Bay - Northern California Community Relations / Student Relations

## Student Relations



**EAST BAY** Rising in the East



The East Bay-Northern California Chapter has been active making contact with the local colleges in our area. The purpose of this alignment is to support the schools' finance and accounting education with actual industry practices, situations, and environment.

### IMA DAY

*The Chapter has been looking at implementing an out-reach concept to the local Universities and Colleges. We are in need of members that are enthusiastic about the Industry and its relationships with students and that would like to assist in flushing out how the Chapter can implement this effort. If you are an Academic, you can really help in providing a win-win direction.*

### SCHOLARSHIPS

The Chapter presents annual Scholarships to: California State University—East Bay (Business Department), Chabot College, Las Positas College, and Ohlone College.

The Chapter presents to the Scholarship Foundations of Chabot College, Las Positas College, and Ohlone College a \$500.00 and 1 Year IMA membership to a deserving student. The Colleges provide information to the Chapter upon identification of the recipients.

The Chapter also presents to the California State University—East Bay (Business Department) a Scholarship Award to a deserving student with a \$1,000.00 and 2 year IMA membership.

### STUDENT SPEAKER TEAM

*For those of you who would like to help young students learn more about accounting and finance, we have a solution! We're putting together a small team of four or five professionals from the chapter who can visit community colleges as a team. This team will interact with the students in a very informal non-threatening atmosphere to answer all the questions new young students have about the profession of accounting and finance, but do not have the opportunity to ask!*

Here's your chance to participate in any of the above endeavors. Contact Ken Shepard 408-607-7866 or [eastbaync@imachapter.org](mailto:eastbaync@imachapter.org).

## EB-NC Student Scholarship Criteria

The intent of the Student Scholarship is to provide a monetary value to a deserving student within the University / College to further their education. Also included with the monetary the Chapter will sponsor either a 1(one) or 2(two) year membership depending on the Student Scholarship. The criteria for these scholarships are:

- Current College Student
- Enrolled full-time (12 Units)
- Accounting Major
- 3.00 GPA
- Completed 24 Units
- Demonstrated Leadership, school activity involvement, and community service, and
- An essay is required.



# East Bay - Northern California Membership

## MYIMA Profile

Please keep your contact information up to date so that you can continue to receive communications from the East Bay—Northern California Chapter or IMA.

If you would like update your information or change your membership into the East Bay—Northern California Chapter or to another chapter, contact IMA Customer Service at 800-638-4427 or go online to your profile at <http://www.imaonlinestore.com/PersonifyEbusiness/Default.aspx?TabId=61> (user ID and password are required).

## Member Recognition

### New Members June 2019

#### New Members (Transfers In)

Mr. Patrick David Wilkie	From Chapter 402 Inland Empire	05/06/2019
Ms. Elizabeth Massie	From Member At Large	06/27/2019

#### Members - Received CMA / CSCA

Mr. Jonathan Fisher, CMA	05/17/2019
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#### Member Anniversaries

#### Members Celebrating 50 Years in IMA Year 2019-20

Mr. Harlan E Kann	04/01/1970
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#### Members Celebrating 25 Years in IMA Year 2019-20

Mr. Robert F. Hulin Jr	08/22/1994
Ms. Tracy T. Ling	10/07/1994
Mr Sudhanshu R. Parikh, CMA	12/28/1994
Mr. James D. Peterson, CMA	12/28/1994
Mr George W. McElroy, CMA	02/08/1995
Mr. William R. Sawyer, CMA, CFA	03/16/1995

#### July 2019 Anniversaries

Mr. William F. Baer	07/01/1966
Mr. Thomas A. Rubin, CMA, CFM, CPA	07/01/1974
Mr. John C. Hardin	07/01/1982
Mr. Michael E. Compton, CPA	07/01/1989
Mr. Grant E. Marston, CMA	07/01/1989
Ms. Amy W Lee, CMA, CPA	07/01/1989
Mr. Thomas C. Tang, CMA, CPA	07/01/1989
Mr. Stephen T. Lanza, CMA	07/01/1989
Mr. Timothy J. Young, CMA	07/01/1989
Mr. Leung Y. Ma, CMA	07/01/1989
Mr. Daniel E. Wehrle, CMA, CFM	07/14/1998
Mr. Adam A. Khouri	07/14/2004
Ms. Elizabeth C Lee, CPA	07/01/2013
Mr. Ryan Kane	07/12/2013
Ms. Gina Samalca Gozo, CMA	07/31/2014
Mr. Talin Wauchope, CMA, CPA	07/01/2017

# Golden West Council

## About the GWC

The Golden West Council is one of twenty-four USA Regional Councils within the Institute of Management Accountants. Its purpose is to provide a pool of resources to assist the local IMA Chapter in attaining the objectives of the national and local organizations. Our Council brings together Eleven Chapters in Northern California, Northern Nevada, and Hawaii to participate in activities that may be too large for a Chapter alone to sponsor.

The council activities include participation in and sponsorship of Leadership Training Sessions, Chapter Management Seminars (CMS) for officers and directors, Regional Educational Seminar and Training (REST), hospitality suites at the Annual International Conference, social events, and formation of new chapters.

The Council teams with chapter leaders and members to share successful chapter strategies and experiences that will assist chapter leaders in moving their chapters ahead with a positive direction. Regional Directors are assigned to chapters to provide advice, counsel, and assistance of their respective Chapter.

## Board Meetings

All IMA Members in good standing may attend the Board Meetings and the Leadership Training Seminar. In addition, if IMA Members have associates or potential members who are interested in the Meeting, please invite them.

Board Members and Chapter Presidents please submit a Position and Chapter reports of your activities and any Future plans to the Council President and the Webmaster by one (1) week prior to meeting

### Aug 18, 2019 - Quarterly Meeting

10:00 AM - 12:00 PM

**LOCATION:** TBD, Santa Rosa, CA

**Cost:** \$25.00 per person for Lunch

Please contact [Nicole Sheets](#) of your meeting attendance.

### Nov 23, 2019 - Quarterly Meeting

10:00 AM - 12:00 PM

**LOCATION:** Zoom Conference

Please contact [Nicole Sheets](#) of your meeting attendance.

### Feb 27, 2020 - Quarterly Meeting

05:30 PM - 07:30 PM

**LOCATION:** Peppermill Reno, NV

Please contact [Nicole Sheets](#) of your meeting attendance.

### May 16, 2020 - Annual Meeting and Leadership Training Seminar

08:30 AM - 04:00 PM

**LOCATION:** Biltmore Hotel and Suites, Santa Clara California

**Cost:** \$40.00 per person for Continental Breakfast and Lunch

Please contact [Nicole Sheets](#) of your meeting attendance.

## Reno Educational Seminar and Training

February 27-29, 2020

Continuing Professional Education: 22.0 Hours CPE

The Golden West Council and the Pacific Northwest Council of IMA, representing 28 chapters in eight states, is pleased to present the premier educational event in the Western U.S. - REST 2020. This two and a half day program ear of offering high quality, leading edge programs geared to accounting and finance professionals.

Prior year attendees have been impressed with the quality of topics and speakers, combined with a low cost destination served by airlines, and offering low cost transportation. This type of seminar is an excellent opportunity for both business and personal networking not available through other CPE delivery mediums.

Location: **Peppermill Reno**  
2707 S Virginia St, Reno, NV 89502

**Registration:** REST-IMA website: <http://rest-ima.org/>

"This website most compatible on Google Chrome, IE 8+, Mozilla Firefox and Safari"

### REST Scholarships

Any chapter member may apply for this scholarship. Chapter Members should complete the [REST Scholarship Application](#) and email the application to:

Scholarship Committee  
Golden West Council of the Institute of Management Accountants  
C/O: TBA  
Golden West Council VP Education

## ABOUT IMA

Management accountants are vital to the financial health of organizations. They make critical decisions, safeguard a company's integrity, and plan for business sustainability. They might be CFOs and controllers, budget analysts and treasurers, or one of many other game changers on internal teams. Most of all, as the majority of the accounting and financial workforce, they help drive an organization's strategy and value amid an unpredictable market.

Management accountants belong at IMA.

IMA® (Institute of Management Accountants) is the worldwide association of accountants and financial professionals in business. Founded in 1919, we are one of the largest and most respected associations focused exclusively on advancing the management accounting profession. We are committed to empowering our 85,000+ members—and those throughout the rest of the profession—to strengthen on-the-job skills, better manage companies, and accelerate careers. We invite our members to discover the myriad possibilities within the profession and build an actionable future in management accounting.

## ACE2019

Attendees had a blast celebrating IMA's 100-year celebration in San Diego! Check out the photo [highlights](#) from the Conference

### ACE2019 IMA Conference Awards (GWC)

East Bay - Northern California Chapter: 3rd place, Warner Division, Brinkley Award  
East Bay - Northern California Chapter: Outstanding Level of Service  
East Bay - Northern California Chapter: Gold (W) Chapter Website Award  
Central California Chapter: Current Membership, Member Growth (W)  
Stockton Area Chapter: Three-Year Membership, Net Growth (W)

Redwood Empire Chapter: ACE Chapter Challenge, 2nd Place \$3,000

SF & Management Accounting Quarterly: Certificate of Merit Feng (Johnny) Deng, CMA, Ph.D., Sacramento Chapter



## Connect. Network, and Grow

### Welcome to myIMA Network

#### Great benefits for members

Are you taking advantage of the exclusive IMA® (Institute of Management Accountants) member platform? **LinkUp IMA is now myIMA Network.** IMA recently updated the experience to help you:

Connect with a community of more than 100,000 professionals around the globe on a platform designed exclusively for IMA members.

Join discussions and ask questions on a variety of topics, from challenges you face on the job to accounting and finance trends, technology, career forums, and more!

Find a study partner and preparation tips for the CMA® (Certified Management Accountant) exam in our CMA study group.

See upcoming IMA events in your local area. Currently, there are more than 200 events listed that you can explore.

[Visit MyIMA Network Now](#)

Take this opportunity to update your profile and start using myIMA Network today!

# Institute of Management Accountants

## Webinars

IMA's webinar program enhances your career by bringing you the latest thought leadership and developments in the profession. IMA conducts more than 50 webinars every year at no cost to our members. Each qualifies for 1 to 1.5 hours of NASBA-approved CPE credits.

*Webinars are open to IMA Members Only.*

[July 02, 2019](#)

**Emotional Intelligence**

Leadership Academy

10:00 AM - 11:30 AM PT

[July 17, 2019](#)

**From RPA to AI – Understanding the Future of Technology for Accounting**

Inside Talk

10:00 AM - 11:00 AM PT

[July 24, 2019](#)

**Becoming a Data-Driven Finance Leader**

Inside Talk

10:00 AM - 11:00 AM PT

[June 06, 2019](#)

**Financial Leadership (New)**

Leadership Academy

10:00 AM - 11:30 AM PT

[August 06, 2019](#)

**Communicating in the 21st Century (Revamp)**

Leadership Academy

10:00 AM - 11:30 AM PT

Click here to register for the webinars:

[IMA Webinars](#)

## Conferences

**Annual Conference Exposition (ACE2020), Atlanta, GA - June 20-24, 2020**

Plan now to attend IMA's next conference and create your own magical opportunity.

Demonstrate to your employer that you are committed to the highest levels of professionalism, willing to take on new challenges, and eager to stretch beyond your current responsibilities by building valuable skills and knowledge to improve performance immediately. Earn NASBA-approved 30+ CPE while sharing your future through highly focused educational sessions, panel discussions, and inspiring discussions with the profession's leaders. Don't be left out.

[Click here to Register](#)

**Annual Student Leadership Conference, Charlotte, NC - November 14-16, 2019**

It's time to think differently and create your own opportunity for career success. In this age of social networking, there is nothing online that has yet to replace the importance of meeting people in person. Learn how to position yourself for future success.

As in past years, students will have an excellent opportunity to network with accountants and finance professionals, fellow students, and educators from across the country. Learn from leading experts about career opportunities, the value of the Certified Management Accountant (CMA®) certification, IFRS, environmental accounting, leadership, job search techniques, and more

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# Associate Organizations

## Excel In Accounting

Excel in Accounting is a community of finance and accounting professionals in and around San Francisco who want to learn and share advanced Excel spreadsheet techniques used specifically for finance and accounting. We promote Excel mastery through training sessions, users group meetings and online media discussion.

July 27, 2019

### Dashboards, Charts & Graphs

It's been said that a picture is worth a thousand words. Charts & graphs in Excel provide a way to visually summarize numerical data. Dashboards are typically a collection of charts that allow managers to get a high-level overview of the business to help them make quick decisions.

In this 2 hours tutorial, we will show you how to make professional looking charts and tips to make powerful and dynamic dashboard elements in Excel.

\*\*\*This is a hands-on learning session\*\*\*

\*\*\*Bring your laptop. No computers provided\*\*\*

**Click here to register. (Not Available at publication)**

**Time:** 9:00 AM - 11:30 AM

#### Cost:

\$30 for IMA and Students

\$40 for Groups (2 or more)

\$50 for General

**Location:** TBA

Excel in Accounting Page: [Click Here](#)

Sat Aug 24, 2019

Functions & Formulas

Sat Sep 28, 2019

Intro to Macros, Macro Recorder

Sat Oct 26, 2019

Power Query

## AFWA

The Accounting and Financial Women's Alliance represents professional women in accounting and finance and provides them an opportunity for networking and continuing professional education (CPE) with peers at the local, regional and national level. Networking, continuing education and leadership opportunities are essential building blocks for professional women and AFWA East Bay provides ongoing opportunities for members to participate and develop powerful business skills. With meetings conveniently located in San Ramon and Walnut Creek, online resources and webinars, AFWA offers a place for exchanging ideas, learning new skills and making great career and personal connections.

July 2019

**No Technical Program Scheduled**

## Diablo Valley Chapter of the IMA

The Diablo Valley Chapter (#0356) of the Institute of Management Accountants was chartered in 1980. The chapter is part of the Golden West Regional Council and the Warner Division which contains chapters that have less than 125 competition members. We exist to serve local accounting and finance professionals with continuing education programs and networking opportunities. If you are a college student, young professional or seasoned professional, we have services that will help you in your career.

July 20 2019

### New Employment Law

**Distinguished Speaker:** [Claudia J. Castillo](#)

### Registration Information

**Rate:** \$30.00 Members and Guests

Space is limited! Please **RSVP by July 12, 2019**

2 Hrs. of CPE

**Location:** Contra Costa Country Club, 801 Golf Club Road, Pleasant Hill, CA 94583

### Menu:

Eggs Benedict breakfast with hash brown potatoes, fruit, juice, coffee/tea

Patt Mayer at (925) 286-2112 or e-mail [pattmayer@earthlink.net](mailto:pattmayer@earthlink.net)

Please respond with name, title, company, menu choice and if an IMA member: your member # and Chapter Affiliation to:

You do not have to be certified or an IMA Member to attend.

East Bay-Northern California  
Chapter of the IMA

The Institute of Management Accountants (IMA®) is the world's leading organization dedicated to empowering management accounting and finance professionals to drive business performance.

The East Bay Chapter (Chapter # 112) serves the Alameda and Southern Contra Costa Counties Area in Northern California.

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The Association of  
Accountants and  
Financial Professionals  
in Business

EAST BAY-NORTHERN CALIFORNIA CHAPTER