

THE READ INK

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

President's Message

East Bay Chapter Members and Friends,

Not sure if you read it, but there was an interesting article in the September issue of the IMA Strategic Finance magazine. Under the Leadership & Careers section, author Jeffrey Davis (VP of Finance and CFO of Presbyterian Senior Living in Dillsburg, PA) speaks about "[The Three E's of Strategic Finance Pros](#)". And while he espouses how management accountants must become *educators, evaluators, and executors* to help ensure their organizations' success, it was really the "educator" part that hit home for me.

As finance professionals, we need to develop the skills and behaviors required to play an essential role in driving business strategy. How often have we done great work in developing a report or analysis, and sent that "information" along its way to the recipient, only to presume that "our work is done". But it isn't. **Information is only as good as the knowledge that is gleaned from it.** *Education is the bridge between information and knowledge.* Compiling and sharing information doesn't always result in knowledge. Reporting doesn't always lead to understanding. Our job has to be to "educate" the business leaders on our team with what the "information" means. Which means shifting from being an "information provider" to more of an "information educator", explaining key concepts and what they mean in a language that the listener understands, avoiding "finance speak."

Information without knowledge is just that. We might as well share a random page of numbers from a phone book. Deliver information with education as to what it means to organizational success.

Share knowledge as well as data.

Mike Gorski, President
IMA East Bay – Northern California chapter
2019-2020

www.imanet.org

CMA® | You've got to earn it.

Latest Information

Did You Know!

Expansion of the role of the accountant

Between the 4th millennium BC and the 3rd millennium BC, the ruling leaders and priests in ancient Iran had people oversee financial matters. In Godin Tepe and Tepe Yahya cylindrical tokens that were used for bookkeeping on clay scripts were found in buildings that had large rooms for storage of crops. In Godin Tepe's findings, the scripts only contained tables with figures, while in Tepe Yahya's findings, the scripts also contained graphical representations. The invention of a form of bookkeeping using clay tokens represented a huge cognitive leap for mankind.

During the 2nd millennium BC, the expansion of commerce and business expanded the role of the accountant. The Phoenicians invented a phonetic alphabet "probably for bookkeeping purposes", based on the Egyptian hieratic script, and there is evidence that an individual in ancient Egypt held the title "comptroller of the scribes". There is also evidence for an early form of accounting in the Old Testament; for example the Book of Exodus describes Moses engaging Ithamar to account for the materials that had been contributed towards the building of the tabernacle.

(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.

By about the 4th century BC, the ancient Egyptians and Babylonians had auditing systems for checking movement in and out of storehouses, including oral "audit reports", resulting in the term "auditor" (from audire, to hear in Latin) importance of taxation had created a need for the recording of payments, and the Rosetta Stone also includes a description of a tax revolt.

https://en.wikipedia.org/wiki/History_of_accounting

Don't Forget About IMA Podcasts

IMA's Podcast Series "Count Me In" is about all things affecting the accounting and finance world! The Podcasts bring the latest perspectives and learnings on accounting and finance to you from the experts working in the field and the thought leaders shaping the profession.

To find out more information, please see this [Page](#) in the newsletter.

Subscribe, download, rate, and review to stay informed on all things affecting the accounting and finance world with this link <https://podcast.imanet.org/>

WINNING ON A TIGHT BUDGET

"Strategic Finance"

Corporations, government, not-for-profits, the military, and educational institutions are frequently fertile ground for valuable lessons on leadership. Sports teams can also provide excellent cases. The Tampa Bay Rays baseball team is currently providing a worthy example for leaders among management accountants and other financial professionals to study. [Read More](#)

GREAT SUCCESS STARTS WITH GREAT LEADERSHIP

"Associations Now"

The role of a leader to keep an organization on track and prepare for the future of work is more vital than ever. Most leaders stand on the foundation to protect an organization's established principles at the same time balancing the conflicting demands of those they lead. A great leader tries to align situations which provide the best outcome for the organization, its employees and their members. [Read More](#)

DISASTER PREPARATION BASICS

"Journal of Accountancy"

Working for a construction business through Florida hurricanes has made Jennifer Elder, CPA/CFF, CGMA, an expert in disaster recovery and business continuity. She offers these tips for organizations.

Understand the necessity and the objectives. "It's sort of a false sense of security when people say, 'This will never happen to me,'" Elder said. She said a disaster plan should outline a two-part process. The first part involves boarding up windows, making sure employees are safe, and taking steps to minimize the immediate damage. The second part should describe business continuity. "Now you figure out how to get back to [your] normal level of business," she said. [Read More](#)

Informational Articles to Assist Your Career!



Robert Half (Accountemps) has provided the following articles on **"4 Ways to Prevent Work Burnout at Your Company"**.

Helping your employees avoid work burnout isn't just good for morale; it's also good for your organization's bottom line. Overwork or stress leading to physical and mental exhaustion can produce disengaged workers who will start looking for other jobs. And staff turnover can come with a high price: It takes time and money to find, hire and train new employees – especially when a company has earned a reputation as a tough place to work...[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 at eastbaync@imachapter.org

Benefits of Joining a Professional Accounting Association

You likely already know that the CMA is a designation that can do wonders to advance an accountant's career and prospects, but what about making the best of your IMA membership?

Savvy CMA candidates don't just join the IMA to get their CMA certification, they also take advantage of the many benefits of IMA membership, both before and after passing their exam. Belonging to this association not only opens a door to networking and community support, leadership opportunities, and knowledge sharing, it also offers fantastic avenues for continuing education, recognition, and special events.

Networking—An Accounting Association Can Help You Land a Job and Leverage Support.

If you join an accounting association for no other reason, join for the networking. The importance of networking opportunities, especially for accounting students and certification candidates, cannot be overstated. The job market is competitive, and in order to land that ideal job, you should be leveraging every advantage possible.

When you're a member of an accounting association, you have the support of a diverse community of colleagues from all over the world! You're part of an organization that actively helps its members gain access to career opportunities, establish lifelong professional relationships, and more. Local IMA chapters, for instance, provide a range of services exclusively to members, which include professional education, leadership, mentoring, and community services.

Leadership Opportunities—IMA Membership Means Getting to Demonstrate Your Abilities

Especially if you plan to earn your CMA—a designation which stands out, in part, for its emphasis on management—being able to demonstrate leadership skills and experience is key. As part of an accounting association, it's easy to learn and demonstrate your leadership skills as well as to have them verified and recognized. If you are a student, or have not yet worked in the field, this is a great chance to find a mentor who can help you develop your leadership abilities.

To illustrate, the IMA has a volunteer program that tracks members' leadership development, and awards digital badges which can be displayed on an online resume or CV. The association also produces a monthly webinar series covering a variety of leadership topics, and even helps members to match to regional and global volunteer opportunities.

As with other designations, in order to maintain your CMA certification you must regularly satisfy CPE (continuing education) requirements. Of course accounting associations are well aware of this, and provide fantastic means of earning your credit hours, and the IMA is no exception.

Associations like the IMA typically offer an abundance of webinars and courses that count toward the credit hours necessary to fulfill your ongoing CPE requirements, but the benefits don't quite end there. In the case of IMA membership, you're also able to earn additional certifications that make your existing one(s) even more valuable!

Not only does accounting association membership bolster your continuing education, it presents ample opportunities to shine. Accounting students in particular, as association members you stand to get ahead of your peers by participating in competitions, receiving prestigious awards, and catching the attention of industry leaders early in your career!

Continued Education and Recognition—Keeping Your Credentials Polished and Visible

Last, and certainly not least, one of the best benefits of accounting association membership is being able to stay in touch with the industry through exciting, informative, in-person events. Annual conferences are where some of the biggest news and changes hit first—not just in accounting, but in all fields.

The IMA holds an Annual Conference & Expo, Regional Conferences, and a special Student Leadership Conference. These are popular events at which accountants and candidates gather to enjoy unique learning experiences as well as some incredible networking. Students, especially those who haven't yet decided on an accounting career path, should attend the Student Leadership Conference in order to:

- Take a tour of the industry, and meet accounting and finance teams from local organizations.
- Learn more about the CMA certification and the latest trends in the profession.
- Meet recruiters from well-known companies who are offering internships.
- Network with industry experts as well as other accounting students.

Staying up-to-date on what is happening in the accounting world should always be on your mind, and should be treated as part of your ongoing education. But industry events are also opportunities for interaction, engagement, and fun. They're a chance to get refreshed and excited for what's going on in the accounting field, and to get a first glimpse at what great opportunities may await you in your career!

Professional Events—Staying on the Pulse of the Industry

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East Bay - Northern California

(Continued from page 3)

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You Can Also Save a Lot of Money on Your Exam Prep!

That's right! One of the greatest things you can do for your CMA career is reduce the cost of getting certified. Gleim CMA Review offers student discounts as well as IMA chapter member discounts on review materials, and candidates can save on membership and exam fees through the IMA!

www.gleim.com/cma-review/blog

[Link](#)

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!

Open Positions:

Vice President of Administration

Director of Competition

Director: Member Relations

Secretary

Vice President Communication

Webmaster

Director: Newsletter

Director: Ethics Program

Director: Excel Program

Director: Technical Meetings

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, or

Robert Hulin at ima.eastbay.nc@gmail.com.

East Bay - Northern California

Chapter Calendar

<u>Date</u>	<u>Event</u>	<u>CPE</u>	<u>Time</u>	<u>Location</u>
2019				
01 Oct	From Accounting-Speak to Plain English: Practical tips	1.0	10:00 AM	Inside Talk
03 Oct	Personal and Professional Life Balance	1.5	10:00 AM	Leadership Academy
08 Oct	The Productivity Imperative: Optimizing the Business in all Economic Conditions	1.0	10:00 AM	Inside Talk
12 Oct	Financial Management Network	4.0	9:00 AM	ConXTech, Pleasanton, CA
16 Oct	How to Accelerate and Optimize Your Close	1.0	10:00 AM	Inside Talk
17 Oct	EB-NC IMA Board Meeting	0	5:30 PM	Pleasanton CA, Zoom
21 Oct	Leadership Driven Strategy: For High-Performance Teams	1.0	10:00 AM	Strategic Management
30 Oct	T&E Trends and Best Practices in the Digital World	1.0	10:00 AM	Inside Talk
05 Nov	Time Management	1.5	10:00 AM	Leadership Academy
03 Dec	Male/Female Communication: Building Collaborative Relationships	1.5	10:00 AM	Leadership Academy
14-16 Nov	IMA's Student Conference			Charlotte, NC
2020				
07 Jan	Mentoring the IMA Way	1.5	10:00 AM	Leadership Academy
02 Feb	Work Motivation (Revamp)	1.5	10:00 AM	Leadership Academy
27-29 Feb	REST 2020	22		Reno, NV
30 Mar	Technology in Leadership (New IP)	1.5	10:00 AM	Leadership Academy
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

October 17, 2019: 5:30 PM to 6:30 PM

This is an in-person meeting as well as a Zoom meeting. Please contact Mike Gorski if you are attending

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

<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

Find your local number: <https://zoom.us/u/accawgDCOY>

East Bay - Northern California Education

Certification



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](#)



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

[\(More Information\)](#)

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.

East Bay - Northern California Education

Certification (Cont.)

CMA Scholarship

Stand out as you graduate

With the CMA Scholarship, you can complete the CMA® (Certified Management Accountant) program at no cost. Take the exam while still in school and dazzle future employers with your management accounting skills

What's included?

Entrance fee to the CMA program
Exam support package with retired exam questions and a glossary of terms
Registration fees covering both parts of the exam (additional fees will apply for retakes)
Wiley CMAexcel Online Test Bank access for both exam parts for up to two years
Up to three years of IMA membership while pursuing the certification

[Download the Nomination Form](#)

For more information, click [here!](#)

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 or contact [Alexandra Graham](#) at 800.874.5346 ext. 428 or 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

Wiley Study Materials

Get ready to pass the 2020 CMA® (Certified Management Accountant) Exam when you study with the all-new Wiley

This comprehensive update covers all of the exam content changes introduced for the CMA exams starting January 1, including major changes and a new section on technology and analytics.

In advance of the changes coming in January, Wiley has added:

- **More Questions** - Wiley CMAexcel has 5,500+ multiple-choice questions
- **More Videos** - Over 65 hours of video lectures
- **More Essays** - There are now 120 essays to help hone your skills
- **Updated Content** - Revamped lessons, questions, flashcards, and study guides that mirror the exam's updated 2020 Learning Outcome Statements
- **Completely New Lessons** - Brand new, crystal-clear lessons by top university instructors impart the skills and advice you need to make exam day successful
- **Session Assessment Questions** - New session assessment questions provide an additional self-assessment to ensure that you fully grasp material before moving forward

All of these features and content are available now.

[Save 25% on IMA's only Official CMA Test Prep](#)

East Bay - Northern California Education

Financial Management Network

October 12, 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.

Time: 9:00 am to 1:00 pm

Location: ConXtech, Inc. Headquarters
6701 Koll Center Pkwy, Suite 150
Pleasanton, CA 94566

Cost: \$40.00 members / Non-members

Full breakfast and lunch included in cost

Registration: [Tricia Scalzo](#)

Sponsored By:



Ethics



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.

Meet the Firms (CSU-EB)

The East Bay – Northern California Chapter Representatives (Ken Shepard and Brian Carlson) attended the California State University – East Bay “Meet the Firms” event on September 20, 2019. Arriving between 5:00 -5:30 PM, they set up a table with collateral of Student Membership data sheet, applications, student surveys, business cards, bucket of lifesavers, and a plastic holder announcing the drawing for completing the survey. Beta Alpha Psi Club had food tables set up for the attendees with sandwiches, sodas, fruit and cookies.

The Chapter met with around 20 students. All the students were looking for opportunities of employment which was understandable as this was a “Meet the Firms” event. Around 5 of the students showed interest in IMA. It was estimated 10 hadn't heard of the IMA or the CMA, a common question was “What's a management accountant?”

The “Meet the Firm” event ended at 9 PM. If any Member would like to assist with the Chapter's Student Outreach Programs, Please contact Brian Carlson brian.carlson@csaa.com or Ken Shepard at kshep99@comcast.net.

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 September 2019

New Members (Transfers In) September 2019

Mr. Rupesh Chamedia	09/06/2019
Mr. Connor Anderson-Procter	09/19/2019
Mr. Gerald Anne DeRubeis	09/21/2019

Members - Received CMA / CSCA

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

October 2019 Anniversaries

Mr. John R. Myles	10/01/1973
Mr. Fernand R. Lewis	10/01/1976
Mr. Richard L. Cavagnaro	10/01/1980
Ms. Linda S. Milbrath-Cano, CMA	10/01/1991
Ms. Tracy T. Ling	10/07/1994
Mr. Sungjin Yoon, CMA, CFM	10/25/1996
Ms. Connie Chin, CMA	10/21/2008
Ms. Jannette Nunag Casanas, CMA, CPA	10/18/2010
Mr. Fadi M Shahin	10/10/2017
Ms. Angeline Loeffler	10/15/2018

Golden West Council

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

Nov 23, 2019 - Quarterly Meeting

10:00 AM - 12:00 PM

LOCATION: Zoom Conference

<https://zoom.us/j/5705024681>

+1 669 900 6833 US

Meeting ID: 570 502 4681

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

Feb 27, 2020 - Quarterly Meeting

05:30 PM - 07:30 PM

LOCATION: Peppermill Reno, 2707 S Virginia St, Reno, NV 89502

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

2151 Laurelwood Rd, Santa Clara, CA 95054

[Map](#)

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

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

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.

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: Patricia J. Mayer, CMA, CPA
Golden West Council Past President,
pattmayer@earthlink.net

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.

IMA Launches Global Ad Campaign to Highlight Importance of Certification in Today's Business Landscape

IMA® (Institute of Management Accountants), launched on September 16, 2019 a new global, integrated advertising campaign in support of the CMA® (Certified Management Accountant) certification program. The advertisements emphasize how accounting and finance professionals who earn the CMA are better positioned to advance their careers and obtain more strategic roles, through greater expertise and confidence.

[Link to Announcement](#)



Be the most valuable voice in the room - CMA commercial 2019

What good is having a seat at the table if you don't have the confidence to speak? Get the Certified Management Accountant and you'll be the most valuable voice in the room. Once you've mastered the 12 most critical practice areas in management accounting, you'll have the one thing leadership wants most: the ability to turn information into insight.

IMA Continues "Count Me In" Podcast

IMA® (Institute of Management Accountants), the association of accountants and financial professionals in business, continues its "Count Me In" podcast series.

The series will feature the latest perspectives on accounting and finance from industry experts. Topics include emerging technologies, business innovation, and the future of the profession. The podcast, produced by IMA's Education and Career Services, aims to deliver actionable information to accounting, finance, and business professionals.

"With the rapid changes we are seeing in the management accounting profession, we wanted to create a platform where professionals can more readily receive information and act on it," said Debbie Warner, CAE, CPLP, Vice President, Education and Career Services at IMA. "Our podcast is the perfect medium to deliver expertise to individuals as they are easily accessible and digestible in our 24/7 news culture."

IMA's September episodes of "Count Me In" ([Podcast Link](#)) featuring various experts discussing timely topics including:

- Ep. 18: Joseph Brunsman - Cybersecurity
- Ep. 17: Ginger White - Career Development and Leadership
- BONUS | Jeff Thomson - IMA and the Future of Management Accounting
- Ep. 16: Dr. Mark Frigo - Leadership Driven Strategy
- Ep. 15: Kaiser Mock - Cross-functional Relationships with Non-Finance Individuals
- BONUS | Ep. 2: Dr. Sean Stein Smith - Accountant's Role with Technologies
- Ep. 14: Brian Kalish - FP&A Embracing Big Data and Technology

New episodes will be added on an ongoing basis with guests spanning multiple industries and disciplines.

"Count Me In" is available for listening and subscribing on iTunes, Spotify, RSS, Google Play, and on the IMA website. For more information, please visit IMA's "Count Me In" page at <https://podcast.imanet.org/>.

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.

October 01, 2019

From Accounting-speak to Plain English: Practical tips

Inside Talk

10:00 AM - 11:00 AM PT

October 03, 2019

Personal and Professional Life Balance

Leadership Academy

10:00 AM - 11:30 AM PT

October 08, 2019

The Productivity Imperative: Optimizing the Business in all Economic Conditions

Inside Talk

10:00 AM - 11:00 AM PT

October 16, 2019

How to Accelerate and Optimize Your Close

Inside Talk

10:00 AM - 11:00 AM PT

October 21, 2019

Leadership Driven Strategy: For High-Performance Teams

Strategic Management

10:00 AM - 11:00 AM PT

October 30, 2019

T&E Trends and Best Practices in the Digital World

Inside Talk

10:00 AM - 11:00 AM PT

November 05, 2019

Time Management Advantage

Leadership Academy

10:00 AM - 11:30 AM PT

December 03, 2019

Male/Female Communication: Building Collaborative Relationships

Leadership Academy

10:00 AM - 11:30 AM PT

January 07, 2020

Mentoring the IMA Way

Leadership Academy

10:00 AM - 11:30 AM PT

February 04, 2020

Work Motivation (Revamp)

Leadership Academy

10:00 AM - 11:30 AM PT

March 30, 2020

Technology in Leadership (New IP)

Leadership Academy

10:00 AM - 11:30 AM PT

Click here to register for the webinars:

[IMA Webinars](#)



Institute of Management Accountants

Women's Accounting Leadership Series

Take the Lead

Our Women's Accounting Leadership Series is designed to bring out the leader in you.

Take your career to the next level

Join IMA Participants as inspiring speakers share their insights about leadership, work/life balance, accounting and finance trends, and their own personal stories. Earn continuing professional education (CPE) credits while expanding your business network and exchanging ideas in an engaging, interactive dialogue. Women and men – seasoned leaders, mid-career colleagues, and aspiring professionals – are welcome. We are excited to add a movie night to our Conference the evening preceding the main event. Join us for the movie, the Conference, or both!

Women's Accounting Leadership Series – Chicago

Thursday, October 10, 2019

6 p.m. – 9 p.m.

2.5 CPE

We are excited to offer a movie screening and discussion of the award-winning documentary *All the Queen's Horses*, which investigates how a city comptroller was able to steal \$37,000 a day for two decades.

Friday, October 11, 2019

9 a.m. – 2 p.m.

4 CPE

All are invited to join like-minded colleagues in an engaging discussion on how to navigate opportunities to improve your career success. Expand your business network while developing leadership skills at the Women's Accounting Leadership Series.

All the Queen's Horses Movie Screening and Discussion

[Register now](#) for **IMA's Women's Accounting Leadership Series**. To register for both events, please click on the "Register Now" link and add the movie to your cart during checkout!

[Register here](#) just for the movie screening.

Both events will be held at **DePaul University, 1 E. Jackson Blvd., Chicago, IL 60604**.

Information regarding local discounted hotel accommodations, parking, and transportation can be found [here](#).

Presenters for the Women's Accounting Leadership Series:

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

[Click here to Register](#)

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.

October 2019

No Technical Program Scheduled

Programs:

Pivot Tables & Pivot Charts
Dashboards, Charts & Graphs
Functions & Formulas
Tools, Tips, Tricks and Traps
Lookups
Intro to Macros, Macro Recorder
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.

October 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.

October 2019

No Technical Program Scheduled

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.

East Bay - Northern California 2019-20 Board of Directors

President	Michael Gorski
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Director: Competition	Open
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Please contact Board Members via eastbaync@imachapter.org.



The Association of
Accountants and
Financial Professionals
in Business

EAST BAY-NORTHERN CALIFORNIA CHAPTER