

THE READ INK

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

President's Message

East Bay Chapter Members and Friends,

Welcome to the March edition of the chapter newsletter! Exciting news.....don't forget to....

SAVE THE DATE - WEDNESDAY, APRIL 8, 2020 – 6:30 PM!

....Why? for **"An Evening with Christian Cuzick, IMA Global Chair"**

....Where? at Johnson & Johnson Vision, 510 Cottonwood Drive, Milpitas, CA 95035

Christian Cuzick, CMA, is Chair of IMA's Global Board of Directors for the 2019-2020 fiscal year. He is also chair of IMA's Governance Committee and a member of the Nominating Committee.

Christian is the Chief Financial Officer for Johnson & Johnson Vision in Santa Ana, Calif. He started his career at Johnson & Johnson in 2004. Over the last 14 years, he's created a reputation for himself both in driving success and for being a collaborative, Credo-based leader. He's also developed a strong understanding of the larger Johnson & Johnson enterprise--providing financial leadership across many business sectors and working across a variety of countries.

Christian has been a member of the IMA Global Board of Directors since 2012, has chaired the Member Relations Committee, and also served as a member of the Governance, the Planning and Development, and the Nominating Committees.

Christian is a Certified Management Accountant (CMA) who holds a Master of Business Administration in Finance from the University of San Francisco and a degree in International Business from San Diego State University.

For more information about the event, click this link:

[Christian Cuzick - April 8th!](#)

To Register for the event, click this link:

[Register for Christian Cuzick - April 8th!](#)

Hope to see all of you there!

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

www.ima.net.org

CMA® | You've got to earn it.



The Association of
Accountants and
Financial Professionals
in Business

Inside this issue

East Bay—Northern California	1
Latest Information	2
Volunteer for BOD	3
Chapter Calendar	4
Chapter Board Meeting.....	4
Educational Opportunities	5-9
Community and Student Relations.....	10
Membership	11
Golden West Council	12
IMA.....	13
IMA Webinars	14
IMA Conferences	15-16
Chapters and Associate Organizations.....	17
EB-NC Board of Directors.....	18

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

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.

Did You Know!

Members Now Get Two Free Ethics CPE

IMA® (Institute of Management Accountants) has always been at the forefront of encouraging ethical professional practices of its members. From the establishment of the first written guidelines for ethical practices for accountants to innovative professional development courses, ethics has stood as a foundational element of IMA over the past 100 years. Last week, IMA took this commitment another step further, by inaugurating a new member benefit that gives members access to two free IMA ethics CPE credits per membership year. In the first week alone, the response from members has been overwhelmingly positive, with more than 700 members already taking advantage of this new benefit.

Under the new program, each member will receive a yearly “token” (found in the “My Tokens” section of the member’s myIMA profile). This token can be used to purchase any one IMA Ethics Series product. Each year, a new token will be automatically issued to each member upon membership renewal. Specific instructions for accessing and redeeming tokens can be found [here](#).

For more information on IMA’s ethics resources, including a confidential Ethics Helpline, please visit the [Education Center](#) on the IMA website.

Informational Articles to Assist Your Career!

Bay Works Recruiting has provided the following article on “**Distraction Management**”

“Your main competitors are not others in your industry. Your main competitors are *distractions*. Don’t let them beat you – stay focused.” Darren Hardy

Do you find yourself looking up and half the day is gone and you feel like you’ve accomplished nothing?


Is that one project weighing on you but you can’t seem to find the time to work on it?



We’ve all been there. What may surprise you is the extent of the distraction issue. Udemy’s survey shows that 70% of workers admit to feeling distracted on the job. The culprits: smartphone, email, general interruptions and unproductive meetings.

Here are some suggestions on how to bring the focus back which will reduce stress and increase engagement in your day: [Link](#)

Robert Half (Accountemps) has provided the following article on “**How Will Disruptive Technologies Change Your Job and Workplace?**”.

 **Robert Half**® From automation to virtual reality to artificial intelligence (AI), we’re in for a lot of change in the coming years. But do you know what those changes mean for your industry, your team or your job?

We examined those questions in our Jobs and AI Anxiety report, which explores how work teams can prepare for the future. We found that technological advancements will impact a variety of industries — in similar and different ways. According to a Robert Half survey of more than 1,200 managers in the accounting and finance, technology, legal, advertising and marketing, and human resources fields, respondents agreed that among a variety of disruptive technologies, AI and machine learning will bring the most change to their profession.

While emerging technologies can create challenges for companies and employees, they offer benefits, too. Managers in the industries we surveyed who believe technology has had a positive impact reported ...[Link](#)

Your Newsletter - Your Articles!

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

East Bay - Northern California

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, 2020. 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!

All Positions are Open:

President

Vice President of Administration

Director of Competition

Director: Member Relations

Secretary

Treasurer

Investment Committee Member (3)

Vice President of Professional Education

Director: CMA Program

Director: FMN Program

Director: Ethics Program

Director: Excel Program

Director: Technical Meetings

Vice President Communication

Webmaster

Director: Newsletter

Director: Community Relations

Director: Marketing

Director: Social Media

Vice President Membership

Director: Member Relations

Vice President Young Professionals

Director: Student Services

Past Presidents may serve on the Chapter Board as Board Advisors

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>
2020				
02Mar	Transforming the Finance Function with RPA	1.5	10:00 AM	Inside Talk
03 Mar	Leading in the Digital Age	1.5	10:00 AM	Leadership Academy
05 Mar	Women's Accounting Leadership Series	3.0	15:30	Amsterdam
06 Mar	Faculty Friday: Do your students have "the right stuff"? IMA Management Accounting Competencies	1.0	10:00 AM	Inside Talk
11 Mar	Seeing "20/20" in 2020: What the recent ASUs mean for your business	1.0	10:00 AM	Inside Talk
11 Mar	Women's Accounting Leadership Series	4.0	14:00	Geneva
14 Mar	Financial Management Network	4.0	09:00 AM	ConXTech, Pleasanton, CA
17 Mar	Social Media for the Modern Accountant (<i>presented at 8:00 PM India Standard Time</i>)	1.0	05:00 PM	Inside Talk
19 Mar	EB-NC IMA Board Meeting	0	06:00 PM	Zoom
25 Mar	Uncovering Insights: Using analytics and benchmarks to improve T&E	1.0	10:00 AM	Inside Talk
07 Apr	Talent Management	1.5	10:00 AM	Leadership Academy
23-24 Apr	Women's Accounting Leadership Series	5.8		New York, NY
05 May	Using Social Media to Improve Workplace Leadership (Revamp)	1.5	10:00 AM	Leadership Academy
16 May	GWC Quarterly Meeting	0	09:45 AM	Santa Clara, CA
02 Jun	Storytelling (New)	1.5	10:00 AM	Leadership Academy
15-19 Jun	IMA's Annual Conference & Expo	30+		Atlanta, GA
07 Jul	Diversity and Inclusion	1.5	10:00 AM	Leadership Academy
04 Aug	Listening Skills	1.5	10:00 AM	Leadership Academy
01 Sep	(Guest Speaker)	1.5	10:00 AM	Leadership Academy
06 Oct	Leadership Networking (New)	1.5	10:00 AM	Leadership Academy
03 Nov	Leading Across Generations	1.5	10:00 AM	Leadership Academy
12-14 Nov	IMA's Student Conference			Pittsburg, PA
01 Dec	Presentation Skills	1.5	10:00 AM	Leadership Academy
2021				
27-29 Feb	REST 2021	22		Reno, NV

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

March 19, 2019: 5:30 PM to 6:30 PM

Please join us from your computer, tablet or smartphone if you not attending in person at:

<https://zoom.us/j/374705213>

Meeting ID: 374 705 213

One tap mobile

+16699006833,,374705213# US (San Jose)

+14086380968,,374705213# 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: 374 705 213

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](#)



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](#).

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](#)!



East Bay - Northern California Education

Certification (Cont.)

Gleim Study Materials

Save up to \$650 when you order the 2020 edition of Gleim CMA Premium Review! Orders can be placed online at <http://Gleim.com/IMAChapter>. Discount will be displayed at check out.

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

Gleim recognizes the value of IMA Chapters and so they are providing IMA chapter members with a special offer now through **March 22nd**. As a Strategic Partner of IMA, we are also providing 30% off of CMA exam entrance fees!

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

In our latest edition, you'll also enjoy:

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

If interested contact via email Alexandra Graham at alexandra.graham@gleim.com or by phone at 1-800-874-5346 ext. 428. Orders can also be placed online at Gleim.com/IMAChapter or by using gleim.com/IMAEBNC. Please note that the \$650 discount will be displayed at check out and not on the initial welcome screen.

Wiley Study Materials

IMA offers an extensive toolkit to help you ace the CMA exam.

Our official partner, third-party publisher Wiley, produces our best-selling CMA exam review program.

Wiley CMAexcel – Your Key to Passing the CMA Exam

Originally published directly by IMA, Wiley CMAexcel is IMA's official CMA test prep suite.

- 100% Coverage of ICMA Learning Outcome Statements
- Multiple Choice Questions & Essays that Mimic the Actual Exam
- Free Course Updates until You Pass the Exam
- IMA Members Receive an Exclusive 25% Discount (Available in Member Area)

[Learn More](#)

[Start Free Trail](#)



East Bay - Northern California Education

Technical Meetings

Save the Date: An Evening with Christian Cuzick

April 08, 2020: 6:30 PM to 8:30 PM

Continuing Professional Education: 1.5 Hour CPE

Speaker: Christine Christian Cuzick, IMA Global Chair

Location: Johnson & Johnson Vision, 510 Cottonwood Drive, Milpitas, CA 95035

Evening Agenda:

Networking and Introductions:	6:30 - 7:00 PM
Speaker and Q&A:	7:00 - 8:15 PM
Program Close:	8:15 - 8:30 PM

Hors d'oeuvres will be served.

Cost: \$20.00 Members and Guests; Free for Students

How to get there: Plane, train, automobile, horse, bicycle, foot (Map)

[Get more information](#)

[Register Now!](#)

[I can't make it](#)

If you have any questions about the event or how to register, feel free to contact Sheela Chandrasekhara at ima.eastbay.nc@gmail.com.

Also, please let us know why you can't make it by clicking on the "I can't make it" link above. This will help up in our planning for future events.

Finally, thank you for your attention and a response, and we look forward to seeing you at the meeting.

Student Plant Tour Review

Visit to PG&E

Institute of Management Accountants (IMA) sponsored an Ohlone College student visit to PG&E's office in San Francisco on February 13, 2020.



This was an opportunity to meet with PG&E's Accounting and Finance team.

The students found out what it is like to work in a large corporate environment and get practical career advice.

The event went well. The tour had 17 management accounting students from Ohlone College along with their professor attend. Ken Shepard and Brian Carlson were the Chapter Board Members that attended from the Chapter. The Event started off with a tour of PG&E's Emergency Operation Center. Then the group had a roundtable discussion with 8 PG&E accounting/finance employees (4 Associates (0 to 2 years of experience) and 4 managers/directors). Topics included PG&E's new hire training program, their career path within PG&E, the opportunities the Corporation have to do different things while working for PG&E, what a typical day was like, what the transition from college to working was like, and advice and recommendations for the students. The students were very engaged during the discussions. After the roundtable discussion the group had lunch. The PG&E employees did a great job of interacting with the students over lunch. Initial feedback has been very positive from the students, their professor and the PG&E employees.

A big thanks to Wayland Chan at PG&E for setting things up on that end, Ken Shepard for making the connection with Professor James Andrews at Ohlone College, Professor Andrews for organizing the student group and getting them to PG&E's office in San Francisco, Brian Carlson for coordinating the Tour, and Sherry Morse for providing the IMA bags, note pads, and pens which were passed out to the delight of the students (along with a small PG&E flashlight).

To view photo of the event, click on this link

MA Student Memberships: Students can join IMA for **only \$39** (<http://www.imanet.org/students/student-membership>). Joining IMA gives students access to scholarships and competitions, networking and professional development opportunities, our Student Leadership Conference, CMA® (Certified Management Accountant) certification, and more!

East Bay - Northern California Education

Financial Management Network

March 14, 2020: 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.

Here are the **March 2020** topics:

Applying Auditing Standards in a Scalable Manner

Field of Study: Auditing

In today's environment there are several influences that have a significant impact on the way auditors operate. Entities are setup in much more complex structures, technology rapidly advances in a way that's affecting the way transactions are recorded and how information is kept, and there is an increase in the gap between auditors and stakeholders as to what's required to be done and what's expected to be done. Our crew was present at the 14th Annual Audit Conference organized by NASBA, the National Association of State Boards of Accountancy, on Ensuring Integrity, and recorded a panel discussion addressing ways to apply auditing standards in a scalable manner.

Business Analytics and Compliance Initiatives

Field of Study: Accounting

Data is all around us, and more often than not, there is too much data surrounding our everyday lives. The question often becomes, what to do with all this information? How can it be used or discarded? How can it minimize the risk of cyberattacks? Is there an underlying benefit in all this data by turning it into revenue producing actions? Risk analysis is often considered more of an art than a science. Russell Safirstein, Partner in Charge at Anchin Digital Risk Solutions discusses business analytics and compliance initiatives.

Latest Developments in Integrated Reporting

Field of Study: Accounting

Integrated reporting is a concept that has been created to better articulate the broader range of measures that contribute to long-term value as value today is increasingly shaped by factors other than financial ones. Charles Tilley, Interim CEO and Robert Laux, North American Lead, both of the International Integrated Reporting Council (IIRC) explain the latest developments in this reporting tool. They also provide examples of how companies are moving towards greater use of integrated reporting, describe the SEC's increased focus on the topic and lay out a vision for its future.

Business Interest Expense Deduction Limitation and More

Field of Study: Taxes

Prior to the 2017 Tax Cuts and Jobs Act (TCJA), section 163(j) of the Internal Revenue code applied only to certain interest paid or accrued by corporations. However, the TCJA significantly changed the section 163(j) limitation. Late in 2018, official guidance was received on the application of business interest limitation under IRC Section 163(j) and recently, the Office of Information and Regulatory Affairs (OIRA) seems to have completed their regulatory review and additional guidance is on the way. Edward Zollars, CPA, a partner with Thomas, Zollars & Lynch, Ltd and a discussion leader for Kaplan Financial Education provides an overview, starting with IRC section 163(j) business interest expense deduction limitations.

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:



East Bay - Northern California Education

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
- Action Required—Navigating Ethical Dilemmas

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
- Web of Deception
- A Pathway to Excellence
- A Prescription for Prevention
- Embracing Ethics
- House Out of Control
- Action Required—Navigating Ethical Dilemmas

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](#).



Act as if what you do makes a difference. It Does! - Quote by William James

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 it 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.

Take Charge of Your Future

Student membership in IMA gives you a competitive edge as you prepare for life after graduation. As a vibrant association of more than 100,000 professionals, students, and academics around the world, our mission is to support members at every stage of their career journeys.

IMA offers a variety of [programs and resources](#) for students:

Differentiate Yourself

Take the CMA® (Certified Management Accountant) exam while you're still in school.

Be Recognized for Academic Excellence

Participate in academic scholarships and competitions offering significant cash awards.

Gain Valuable Leadership Experience

Join or start an IMA student chapter on your campus.

Launch Your Professional Network

Connect with IMA's 100,000+ members around the globe

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

February 2020

New Members

Ms. Emily Chin	Regular	02/26/2020
----------------	---------	------------

New Members (Transfers In)

Mr. Han Zhang, CMA	Regular	From 0027	02/10/2020
Mr. Jonathan Short, CMA	Regular	From 0010	02/24/2020

Members - Received CMA / CSCA

Member Anniversaries

Members Celebrating 50 Years in IMA Year 2019-20

Mr. Harlan E Kann	04/01/1970
-------------------	------------

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

March 2020 Anniversaries

Mr. Dale R. Brown, CMA, CPA	03/01/1991
Mr. William R. Sawyer, CMA, CFA	03/16/1995
Mr. Roland F. Brunner	03/13/1996
Mr. Edward S. Remer, CMA	03/17/2008
Ms. Yanwei Wang, CMA, CSCP	03/17/2013
Mr. Lawrence Paul Gieseke, CPA	03/06/2014
Mr. Paul Hendry	03/17/2016
Ms. Mehert Mengstu	03/26/2017
Ms. Ermonela Grada	03/29/2017
Mr. Brian G. Carlson, CMA	03/14/2019
Ms. Tabatha R Sloggett, CMA	03/27/2019



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

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.

Reno Educational Seminar and Training

February 25-27, 2021

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 2021. 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.

Examples of topics from Rest 2020 were:

- GAAP Updates & Other Pronouncements 2020,
- Time's Up for Change: Are You Keeping Up With The World Of Employment Law?,
- Audigators! Using Auditing & Investigative Techniques for Synergy,
- Build a Complete Management Reporting System in Excel in 3 Hours,
- And more!

This type of seminar is an excellent opportunity for both business and personal networking that is not normally 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 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 features 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 January's episodes of “Count Me In” ([Podcast Link](#)) featuring various experts discussing timely topics including:

- Ep. 47: MaryBeth Hyland - Organizational Culture
- Ep. 48: Reed Handley - PR and Media for F&A
- Ep. 49: Katie Thomas - Want to grow your business and become more profitable?
- BONUS | Ep. 10: Rhondalynn Korolak - It's Not About What You Know, It's About What You Can Move Your Client to Do.
- Ep. 50: Blake Oliver - So what's the big deal about the Cloud?
- Ep. 51: Dr. Kelly Richmond Pope - Fraud, Film, and Lifelong Learning
- BONUS | Kelly Paxton - Pink Collar Crime

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/>.

IMA needs you to spread the word: CMA's official ad campaign

This past September IMA officially launched our 4th CMA campaign year and successfully created 4 new CMA commercials! That's at least 4 times as many ways for you to have fun sharing your CMA story, practical CMA advice, and our relevant, humorous, and inspiring new CMA ads. YOU can help someone in need of advancing their career! See the campaign [here](#).

We are asking that you share, like, and post about the CMA. When you share information on your social accounts like LinkedIn, post and answer questions on Reddit and Quora, or like the commercial on YouTube, you lend credibility to the CMA. The success of this campaign and the CMA program depends on extending IMA's reach and voice, and we rely on volunteers like you in making that happen.

Please see below how and where you find us if you don't already follow IMA online

Facebook: @IMAnetORG

Twitter: @IMA_News

Instagram: @IMAGlobal

LinkedIn: Search for IMA Institute of Management Accountants

YouTube: Institute of Management Accountants

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.

[March 02, 2020](#)

Transforming the Finance Function with RPA

Inside Talk

10:00 AM - 11:30 AM PT

[March 03, 2020](#)

Leading in the Digital Age

Leadership Academy

10:00 AM - 11:30 AM PT

[March 06, 2020](#)

Faculty Friday: Do your students have "the right stuff"?

Inside Talk

IMA Management Accounting Competencies

10:00 AM - 11:00 AM PT

[March 11, 2020](#)

Seeing "20/20" in 2020: What the recent ASUs mean for your business

Inside Talk

10:00 AM - 11:00 AM PT

[March 17, 2020](#)

Social Media for the Modern Accountant

Inside Talk

(presented at 8:00 PM India Standard Time)

05:00 PM - 06:00 PM PT

[March 25, 2020](#)

Uncovering Insights: Using analytics and benchmarks to improve T&E

Inside Talk

10:00 AM - 11:00 AM PT

[April 07, 2020](#)

Talent Management

Leadership Academy

10:00 AM - 11:30 AM PT

[May 05, 2020](#)

Using Social Media to Improve Workplace Leadership (Revamp)

Leadership Academy

10:00 AM - 11:30 AM PT

[June 02, 2020](#)

Storytelling (New)

Leadership Academy

10:00 AM - 11:30 AM PT

[July 07, 2020](#)

Diversity and Inclusion

Leadership Academy

10:00 AM - 11:30 AM PT

[August 04, 2020](#)

Listening Skills

Leadership Academy

10:00 AM - 11:30 AM PT

[September 01, 2020](#)

(Guest Speaker)

Leadership Academy

10:00 AM - 11:30 AM PT

[October 06, 2020](#)

Leadership Networking (New)

Leadership Academy

10:00 AM - 11:30 AM PT

[November 03, 2020](#)

Leading Across Generations

Leadership Academy

10:00 AM - 11:30 AM PT

[December 01, 2020](#)

Presentation Skills

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

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 sharpening leadership skills at the Women's Accounting Leadership Series.

Amsterdam

Thursday, 5 March 2020

15:30 to 21:00 (check-in starts at 15:00)

Antonio Vivaldistraat 2, 1083 HP Amsterdam .

4.0 CPE

[Register now](#)

Geneva

Wednesday, 11 March 2020

14:00 to 19:00 (check-in starts at 13:30)

Caterpillar, Route de Frontenex 76, 1208 Geneva, Switzerland .

4.0 CPE

[Register now](#)

New York City

Friday, April 24, 2020

9 a.m. – 3 p.m.

5.8 CPE

[Register now](#)

To register for both events, please click on the "Register Now" link and add the movie to your cart during checkout!

Free Movie Screening and Discussion of *All the Queen's Horses*

Thursday, April 23, 2020

6 p.m. – 9 p.m.

2.0 CPE

We are excited to offer a free movie screening and discussion with the director 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. Light refreshments will be served.

This event will be held at **EY Times Square** (5 Times Square, 22nd Floor Café, New York, NY 10036).

[Register now](#)

For more details on the Women's Accounting Leadership Series, view our full agenda and bios [here](#).

For more details on the Movie Screening and Discussion, view our full agenda [here](#).

For more information on NASBA CPE policies, click [here](#).



Institute of Management Accountants

Have You Looked at IMA's "Technology and Analytics Center" Webpage

Empowering You with Technology & Analytics

The IMA's center for educational resources focuses on key technology and data analytic trends affecting the accounting and finance profession. From webinars to research, IMA is dedicated to providing a relevant and robust portfolio of resources to better serve your technology needs.

Included on this page with examples:

Webinars

[Accountancy in The Digital Age – Relevance Gained and The Call to Action](#)
[Tech Trek - A Journey Through the Latest Trends](#)

Articles

[AI: New Risks and Rewards](#)
[Accounting For Cryptoassets](#)

Online Courses

[IMA Excel 365: Tips in Ten](#)
[IMA Excel: Data Analytics - Combo Package](#)

Research

[Impact of Big Data on Finance: Now and in the Future](#)
[How to Embrace Data Analytics to Be Successful](#)

Blogs

[We Are All Futurists Now](#)
[Explainable AI: Is It Even Possible?](#)

Podcasts

[Ep. 51: Dr. Kelly Richmond Pope - Fraud, Film, and Lifelong Learning](#)
[Ep. 50: Blake Oliver – So what's the big deal about the Cloud?](#)

Visit the [PAGE](#) often for updated content

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 - "Power Your Potential", Pittsburg, PA - November 12-14, 2020

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

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.

February 2020

No Technical Program Scheduled

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.

March 2020

No Technical Program Scheduled

Typical 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.

March 2020

No Technical Program Scheduled

IIA

Internal auditing is an independent, objective assurance and consulting activity designed to add value and improve an organization's operations. It helps an organization accomplish its objectives by bringing a systematic, disciplined approach to evaluate and improve the effectiveness of risk management, control, and governance processes. .

April 2020 Seminar

Event Type: Speaker Presentation

Start Date/Time: 4/23/2020 @ 8:30 AM

End Date/Time: 4/23/2020 @4:30 PM

Location: Bio-Rad (2000 Alfred Nobel Dr, Hercules, CA 9454) | California

Please join us for our April seminar: Three-lines of Defense, Ethical Risk Management, and IT Governance (non-technical) presented by Jay Ranade.

This seminar will be a multi topic presentation covering:

3 lines of defense - understanding roles and responsibilities to harmonize value creation and internal mobility within an organization

Ethical risk management - defining, discussing and addressing the unique regulatory, cultural, and personal ethical dilemmas confronted by managers

IT governance - Alignment, value delivery, risk management, performance management, and resource utilization

This event offers 8 CPEs and will be hosted by Bio-Rad in Hercules, CA. [More information, including registration, will be posted soon.](#)

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
VP of Administration	Open
Director: Competition	Open
Secretary	Open
Treasurer	Robert Hulin
Investment Committee	
	Bill Sawyer
	Pankaj Pandey
	Chung Bothwell
VP of Professional Education	Sheela Chandrasekhara
Director: CMA Program	William Sievers
Director: FMN Program	Tricia Scalzo
Director: Ethics Program	Open
Director: Excel Program	Open
Director: Technical Meetings	Open
VP of Communications	Open
Director: Community Services	Chung Bothwell
Director: Marketing	Open
Director: Social Media	Kevin Clancy
Director: Newsletter	Robert Hulin (Acting)
Webmaster	Robert Hulin
VP of Membership	William Sievers
Director of Member Relations	Open
VP of Young Professionals	Ken Shepard
Director of Student Services	Brian Carlson
Board Advisors	Sherry Morse

Please contact Board Members via eastbaync@imachapter.org.



The Association of
Accountants and
Financial Professionals
in Business

EAST BAY-NORTHERN CALIFORNIA CHAPTER