

# THE READ INK

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

## President's Message

East Bay Chapter Members and Friends,

Happy New Year!

This year (July 2018 through June 2019) is a historic one as the IMA celebrates its Centennial ("100 Years and Counting"). It is an exciting time to be part of the IMA family, as we celebrate 100 years of service to our members and to the profession. This longevity and strength did not happen by chance. By providing its members innovative new programs and services, the IMA has and will continue to add value and help future-proof our profession and us as professionals.

*Here are just a few examples of how the IMA has made an impact;*

The creation of the CMA® (Certified Management Accountant) certification, the world's leading management accounting credential. See <https://www.imanet.org/cma-certification> for more details.

The enhanced Management Accounting Competency Framework, which includes skills that finance professionals will need to remain relevant as new technologies such as blockchain, machine learning, and robotics process automation impact the profession. The framework is the first product of IMA's new research initiative focused on identifying how management accounting is changing and the new skills professionals need. See <https://www.imanet.org/career-resources/management-accounting-competencies> for more details.

Empowering the next generation by providing the Century Student Scholarship Fund, an initiative to support students in the pursuit of their education as they embark on their accounting and finance career paths. Funding recognizes high achieving students and paves a way for them towards rewarding careers in management accounting. See <http://ima100years.org/contribute/> for more details.

As you can see, the IMA's advancements extend across the areas of research, education, career development, ethics, and leadership. It's inspiring that many of these innovations are owed to the engagement and expertise of our vibrant IMA community.

In closing, please note that the East Bay – Northern California chapter will be celebrating the IMA Centennial in style with our very own social event that is scheduled to take place in the next few months. Stay tuned as details on where and when will follow in next month's newsletter!

Thank you for helping make IMA the influential association it is today – here's to 100 years and counting!

Mike Gorski  
President 2017-18  
East Bay - Northern California Chapter  
[mgorski1761@yahoo.com](mailto:mgorski1761@yahoo.com)



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

## 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.

## Latest Information

### 100 Years and Counting

Come join IMA's 100-Year Celebration

IMA is celebrating our 100th anniversary in 2019! To kick-off this year-long celebration, we are proud to announce our 100-year celebration website! It features a timeline of IMA's history, future-focused research and our enhanced Competency Framework, and an interactive map of our global reach. Over the next 18 months, we'll be updating and adding new content. Also, if you share your "IMA story" on Twitter or Instagram using #IMA100YEARS, you can see your post featured on the site! Visit [www.ima100years.org](http://www.ima100years.org) to learn more.

### SAVE THE DATE

The East Bay—Northern California Chapter will be hosting a 100 Year Celebration Event on Saturday September 15, 2018 or Sunday September 16, 2018. Be on the lookout for information on this event.



**IT'S OUR BIGGEST CMA SALE OF THE YEAR!**

**Save up to \$525 on your Gleim CMA exam prep and IMA fees through this limited-time event.**

*Don't miss your chance to get Gleim CMA at its lowest price all year!*

*30% off Gleim CMA + 30% off IMA membership +30% off CMA entrance fee*

[Save Now](#)

Click [Here](#)

Need CPE: Review the Technical Events from our Chapter as well as the Diablo Valley and San Francisco (EXCEL in Accounting) Chapters. Information is detailed in this newsletter.

Have you checked out our redesigned Website <http://eastbaync.imanet.org/>. There was a need to align IMA's brand across all lines of business. Who is the IMA? How do members or potential members relate to the brand? The new website clearly showcase's the IMA's brand. If you have any suggests of comments, please let the Webmaster know.

Robert Half (Accountemps) has provided an article on "**The Future Is Now: How to Help Your Team Navigate Digital Disruption**". Please follow this [link](#) to read the article.

# East Bay - Northern California

## Chapter Calendar

<u>Date</u>	<u>Event</u>	<u>CPE</u>	<u>Time</u>	<u>Location</u>
<b>2018</b>				
14 Jul	Financial Management Network	4.0	9:00 AM	Pleasanton, CA
16 Jul	Data Science in Accounting: Foundational Skills in Modern Analytics	1.0	10:00 AM	Inside Talk
19 Jul	EB-NC IMA Board Meeting	0	6:00 PM	GoToMeeting/Home
25 Jul	Rolling Forecasts Accelerate Business Performance	1.0	10:00 AM	Inside Talk
28 Jul	Excel in Accounting: Dashboards, Charts & Graphs	2.0	9:30 AM	Oakland, CA
01 Aug	5 Things You Can Do Now to Embrace the Future of Accounts Payable	1.0	10:00 AM	Inside Talk
07 Aug	Employee Engagement: The Competitive Advantage	1.5	10:00 AM	Leadership Academy
08 Aug	Got Balance? Streamline Your Account Reconciliations	1.0	8:00 AM	Inside Talk
18 Aug	GWC Quarterly Meeting	0		TBA
15 or 16 Sept	EB-NC Chapter 100 Year Anniversary Event	0	TBA	TBA
01-03 Nov	IMA's Student Leadership Conference			St. Louis, MO
16-17 Nov	GWC Quarterly Meeting and Training	8		Honolulu, HI
<b>2019</b>				
21 Feb	GWC Quarterly Meeting	0	5:15	Reno, NV
21-23 Feb	REST 2019	22.0		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

July 19, 2018: 6:00 PM to 9:00 PM

*This Meeting is an in-person meeting, which all members may attend.*

Sherry Morse's Home  
2311 Corte de la Jara  
Pleasanton, CA 94566

Please contact Mike if attending.

If you are unable to attend in person, please join us from your computer, tablet or smartphone at:

<https://global.gotomeeting.com/join/642681925>

You can also dial in using your phone.

United States: +1 (872) 240-3311

Access Code: 642-681-925

First GoToMeeting? Try a test session: <http://link.gotomeeting.com/email-welcome>

# East Bay - Northern California Education

## Financial Management Network

July 14, 2018: 9:00 AM to 1:00 PM

Continuing Professional Education: 4.0 Hour CPE



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

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

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

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

Sponsored By:



## CMA Instructor-Led Program



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?

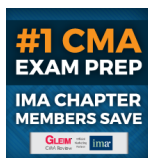
The find out the answers to these questions and more, please look for our future announcement on attending the GoToMeeting Presentation . If interested please contact William Sievers at [William.Sievers@wsp.com](mailto:William.Sievers@wsp.com).

# East Bay - Northern California Education

## Gleim Study Materials

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

Gleim CMA Review has the largest exam-emulating test bank of multiple-choice and essay questions, our popular CMA exam instructional videos, and a no-hassle Access Until You Pass® guarantee. Pass the CMA exam with Gleim CMA, the #1 CMA Prep Course on the market which has trained more CMAs than any other course available.



Place your order directly online by going to this link [https://www.gleim.com/store/discount/index.php?ref=IMAEBNC&pk\\_kwd=IMAEBNC](https://www.gleim.com/store/discount/index.php?ref=IMAEBNC&pk_kwd=IMAEBNC) or contact Alexandra Graham at 800.874.5346 Ext. 428 or by email at [imachapters@gleim.com](mailto:imachapters@gleim.com) to learn about the significant discounts you are eligible for as an IMA Chapter member.

## Microsoft EXCEL

### 2010 Microsoft Excel Presentations



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

Session Criteria:

- Session can be booked by any active EB- NC Chapter member.
  - Only one session per member may be booked.
  - No charge to the member, your company, or additional associates/guests.
  - Request minimum of 5 attendees with no practical max.
  - A room at the Member's location will be required with either AV system or ability to project slides on wall.
  - Attendees may bring laptop and do Excel steps live or just follow along with presentation printouts.
  - Are you a member of a non-profit or civic organization and think they might benefit from a session? Please contact me to book session.
- Does your organization need Excel Power Pivot. No. This session may help decide if invest in Power Pivot is reasonable.
- Want to include attendees remotely? Of course! But the organization will need to set up Skype/WebEx availability.

This is the only free Excel session available to active EB-NC Chapter members; so please take advantage of it.

Fair Warning: The last five minutes of the session will be a discussion on reasons to join IMA and get the Certified Management Accountant credential from the IMA. We will have brochures on both the IMA and the CMA certification.

Interested: Contact John Hallett at [jhallett@well.com](mailto:jhallett@well.com) or call 925-285-5824. This is an member benefit to you as an active EB-NC Chapter member

# East Bay - Northern California Education

## Ethics Presentation



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)
- Misplaced Trust / Devastating Fraud
- The Slippery Slope of Greed
- Misplaced Trust | Devastating Fraud

### Other Individual Ethics Courses:

- Web of Deception
- Whistleblowers Wanted
- A Pathway to Excellence
- When Silence Is Not Golden
- A Prescription for Prevention
- Earnings Management and a Case of Ethics
- Embracing Ethics
- Corporate Ethics: From Policy to Practice

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 John Hallett [jhallett@well.com](mailto:jhallett@well.com) or Mike Gorski [mgorski1761@yahoo.com](mailto:mgorski1761@yahoo.com).

## 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. In October 2017, The Chapter has presented 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 will provide information to the Chapter upon identification of the recipients. In May 2018, the Chapter will attend the California State University—East Bay (Business Department) Scholarship Award Ceremony and present a deserving student with a \$1000.00 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 IMA 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 [kshep99@comcast.net](mailto:kshep99@comcast.net).

# 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 May 2018

Mr. Ditter Alexis Salvador Guillermo Perez Orozco	Regular	05/04/2018
Mr. Ronald Catahimican	Student	05/10/2018

### Members - Received CMA / CSCA

### Member Anniversaries Members Celebrating 50 Years in IMA Year 2018-19

### Members Celebrating 25 Years in IMA Year 2018-19

Mr. Jon Parkinson, CMA	08/18/1993
Ms. Mary-Ann E. Wolfenden, CMA	09/07/1993

### June / July 2018 Anniversaries

Mr. Jay R. Perry	06/01/1992
Ms. Karla M. Brauer, CPA	06/17/2008
Mr. Perry P. Choi, CMA	06/25/2008
Ms. Paulami Mullick, CMA	06/02/2012
Ms. Ann Claudette Domingo	06/16/2017
Ms. Tianlin Zhu	06/11/2017

Mr. William F. Baer	07/01/1966
Mr. Thomas A. Rubin, CMA, CFM, CPA	07/01/1974
Mr. John C. Hardin	07/01/1982
Mr. Michael E. Compton, CPA	07/01/1989
Mr. Grant E. Marston, CMA	07/01/1989
Ms. Amy W Lee, CMA, CPA	07/01/1989
Mr. Thomas C. Tang, CMA, CPA	07/01/1989
Mr. Stephen T. Lanza, CMA	07/01/1989
Mr. Timothy J. Young, CMA	07/01/1989
Mr. Clifford U. Jackson, CMA	07/01/1989
Mr. Leung Y. Ma, CMA	07/01/1989
Mr. David P. DiMare, CMA, CPA	07/01/1990
Mr. Daniel E. Wehrle, CMA, CFM	07/14/1998
Ms. Elizabeth C Lee, CPA	07/01/2013
Mr. Ryan Kane	07/12/2013
Ms. Gina Samalca Gozo, CMA	07/31/2014
Mr. Alexander K Kiani	07/05/2016
Mr. Talin Wauchope, CMA, CPA	07/01/2017
Mr. Adrian A Sandoval	07/05/2017
Ms. Carmen F Dayton	07/05/2017
Ms. Gini Fiero	07/18/2017

# Golden West Council

## About the GWC

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

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

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

## Board Meetings

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

Please notify Patricia Mayer ([pattmayer@earthlink.net](mailto:pattmayer@earthlink.net)) of your meeting attendance.

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

### August 18, 2018 - Quarterly Meeting

10:00 AM - 12:00 PM

LOCATION: TBA

([Map](#))

Call (925) 689-1440 if Lost

COST: \$25.00

If unavailable to attend in person, Members may call in:

Go To Meeting

Computer: <https://global.gotomeeting.com/join/673605709>

Telephone: Dial +1 (571) 317-3122

Access Code: 673-605-709

### November 16-17, 2018 - Quarterly Meeting and Technical Training

TBA

LOCATION: **Honolulu, HI**

Additional Information to be forthcoming.

## Reno Educational Seminar and Training



### February 21-23, 2019

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 2019. This two and a half day program celebrates its 23rd year 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.

[REST 2018 Brochure](#)

**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: Scott Berry  
Golden West Council VP Education  
[scottberry8@yahoo.com](mailto:scottberry8@yahoo.com)



## 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 Announces 2018 Global Award Winners at Annual Conference & Expo

MONTVALE, N.J., July 6, 2018 /PRNewswire/ -- IMA® (Institute of Management Accountants) announced the winners of its prestigious Global Awards program during the 2018 IMA Annual Conference & Expo, held in Indianapolis in June. The recipients were honored for their long-time service and leadership to IMA, as well as their roles in helping advance the accounting and finance profession.

"These award recipients exemplify IMA's core values and each, in their own way, help further our mission," said Alex C. Eng, CMA, CFM, IMA Chair (2017-2018). "Their dedication to the profession and to our organization makes so much of what we do here at IMA possible and we're extremely proud of their commitment and leadership."

### IMA's Global Awards program includes:

The **IMA Lifetime Achievement Award**, recognizing an IMA member who has demonstrated sustainable, extraordinary leadership and dedication to IMA over a lifetime of service, was presented to *Bud Kulesza, CMA, CFM*. Kulesza has a long history of service to IMA, including senior volunteer leadership positions such as Chair and Interim Executive Director. He is the former CFO of ITT Automotive.

The **Exemplary Board Member Award**, recognizing a member of the IMA Global Board who exemplifies excellence through preparation, participation and service, was presented to *Anthony N. Caspio, CMA*, IMA Global Board member, and vice president of supply chain global equipment at Sealed Air Corporation.

The **Exemplary Young Professional Award**, recognizing an IMA young professional with outstanding and creative approaches to problem solving within the accounting and finance profession, was presented to *Derek A. Fuzzell, CMA, CSCA, CPA*, co-chair of IMA's Diversity and Inclusion committee and vice president of finance at Northwest Federal Credit Union.

The IMA Champion Award, recognizing IMA members who have shown exemplary volunteer and leadership skills, was presented to the following individuals:

*Cinda S. Mijal, CMA, CFM, CPA, of IMA's Heart of Wisconsin Chapter*

*Mike Pu, CMA, CFM, of China Education*

*Paul Myers, CMA, of IMA's Dayton Chapter*

## Webinars

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

*Webinars are open to IMA Members Only.*

July 16, 2018

**Data Science in Accounting: Foundational Skills in Modern Analytics** Inside Talk  
10:00 AM -11:00 AM PT

July 25, 2018

**Rolling Forecasts Accelerate Business Performance** Inside Talk  
10:00 AM -11:00 AM PT

August 01, 2018

**5 Things You Can Do Now to Embrace the Future of Accounts Payable** Inside Talk  
10:00 AM -11:00 AM PT

August 07, 2018

**Employee Engagement: The Competitive Advantage** Leadership Academy  
10:00 AM -11:30 AM PT

Click here to register for the webinars:

[IMA Webinars](#)

# Institute of Management Accountants

## IMA Grants and Scholarships

The IMA (at the Global Level) sponsors multiple scholarships for students. If you have not read up on these please do so. One out our Regional Council's members from another Chapter was nominated by her Professor and received the CMA Scholarship Award and is taking the test this year.

### CMA Scholarship Program

Students are nominated by faculty to receive this scholarship, which allows the student to prepare for and take the CMA exam at no cost to them.

Deadline: June 1 [Nominate here](#)

### IMA Memorial Education Fund (MEF) Scholarship AND Stuart Cameron & Margaret McLeod Memorial Scholarship (SCMS)

IMA offers scholarships to graduate and undergraduate students based on specific criteria. Those who apply for the MEF scholarships are automatically considered for the SCMS scholarship.

Deadline: March 10 [Apply here](#)

### CMA Doctoral Scholarship Program

Available to all candidates in an accredited doctoral accounting program concentrating in management accounting or financial management, this program enables candidates to take the CMA exam at no cost.

Deadline: Ongoing [Apply here](#)

### Doctoral Summer Research Scholarship Program

This scholarship awards \$5,000 to help alleviate the need for doctoral students to teach during the summer and focus on research. Accepting applications each Winter.

For more information about Research Opportunities please visit our [Research Foundation](#) page.

Deadline: April 15 [Apply here](#)

### Doctoral Student Grant Program

This program is designed to assist doctoral students pursuing research in the area of management accounting.

Deadline: Ongoing [Apply here](#)

### EFWA Scholarships for Women in Accounting

IMA sponsors three annual scholarships with our longtime partner, the Educational Foundation for Women in Accounting (EFWA). These scholarships are awarded to women at the undergraduate, graduate, and postgraduate levels and include CMA exam fees and IMA membership.

[Learn More](#)

## Be Future Proof with the CMA

The future of accounting is here! Automation and AI are changing the accounting profession, but if you're a CMA® (Certified Management Accountant), you aren't worried. CMAs have mastered the 11 most crucial practice areas in management accounting, meaning they'll be the ones making the big decisions. Visit <https://www.imanet.org/cma-certification>

Check out our 2017 CMA commercial.

[Be Future-proof with the CMA - 2017 Commercial - TV Version](#)

## Conferences

### Annual Conference Exposition (ACE18), San Diego, CA - June 15-19, 2019

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, St. Louis, MO - November 01-03, 2018

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.

July 28, 2018

### Pivot Tables/Pivot Charts

9:00 AM - 11:30 AM

Filtering is one of the most powerful Excel tools used to analyze data, enabling you to summarize and focus in only the information needed and disregard what isn't. As with most tasks in Excel, there is more than one way to filter. This class will cover how to use various filtering tools in Excel effectively to achieve your business objective.

Presented by: Experienced Excel user - Roger Nakayu, Jason Bradfield, Stephen Tin

Limited seats - 30 only

\$30 for IMA and Students

\$40 for Groups (2 or more)

\$50 for General

To Register: [Eventbrite](#)

Additional Information: SFIMA—Excel in Accounting Page: [Click Here](#)

### Location:

Robert Half

1999 Harrison Street #1000, Oakland, 94612

[map](#)

### Future Events:

Sat Aug 25, 2018 [Tools Tips Tricks & Traps \(Preview\)](#)

Sat Sep 29, 2018 [Functions and Formulas](#)

Sat Oct 27, 2018 [Power Query](#)

## AFWA

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

July 2018

**No Technical Program Announced**

## Diablo Valley Chapter of the IMA

July 2018

**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.

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