

# THE READ INK

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

## President's Message

### East Bay Chapter Members and Friends,

An article in the March edition of our Strategic Finance magazine caught my eye this past month. Partly because, with Spring in the air, my mind was thinking about (among other things) the start of another baseball season. The article is titled 'Be An "ACE"', written by Nick Lebrede. The acronym "ACE" stands for Attitude, Character, Effort, and it is the author's daily "mantra". Here are some excerpts.

In almost every context, "ace" is a word that relates to achieving excellence. An exceptional aviator is called an ace. In baseball, a team's best pitcher is referred to as their ace. As leaders in the workplace, we are most effective when we focus our energy on what's within our control. Unfortunately, it's human nature to become upset or anxious about things we can't control. In every such situation, repeating the mantra "ACE" may help us to stay focused on what's important and what we can control instead (i.e. our Attitude, our Character, and our Effort). Here's how:

**Attitude** – be positive, be optimistic, be a "proactive realist". Hoping things will turn out for the best isn't enough. We need to be solution-oriented rather than problem-oriented. Ask the question, "How can I make things better?" Focus energy on what we can change and improve!

**Character** – Our character can be our best asset or biggest liability. Each of us has at least two characters: who we are at present and who we aspire to be. Having the courage to do our duty is at the core of character. If we make a mistake (and we will), then we need to acknowledge it, take responsibility, and move forward strengthened by the new knowledge gained from the experience.

**Effort** - There will always be others who may have more natural talent or be in better circumstances than us. Our starting points in life aren't equal. But what we do between the beginning and the end is up to each of us. So, what's the key to achieving our goals? Effort and persistence. Hard work beats talent when talent doesn't work hard.

If you have an interest and willingness to serve in a volunteer leadership role, contact me directly at the email address below. And Thank You! to our current team of volunteers for leading the way!

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

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

CMA® | You've got to earn it.

## Latest Information

### Don't miss IMA's 100th Anniversary celebration at ACE2019

Join us **June 15-19, 2019**, in beautiful San Diego for expert training, networking, an epic celebration, and spectacular keynote speakers headlined by the one and only...

### JAY LENO!

Registration opens February 13 with our Early Bird rate of \$1,300 for IMA members – a savings of \$350!  
We look forward to seeing you in June!

(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)

### **Registration open for COSO Live Workshops at IMA headquarters**

A Week-Long COSO Live Event at IMA Headquarters

Get the tools you need to better manage your organization's risk and develop a more effective internal control system. Two essential COSO Live Certificate Workshops are coming to IMA's® (Institute of Management Accountants) global headquarters in Montvale, N.J. in April. These courses provide vital tools to drive business objective achievements throughout your organization.

**COSO Internal Control—Integrated Framework Live Workshops**

**COSO Enterprise Risk Management Live Workshops**

Registration and more information at <https://www.imanet.org/events/coso-certificate-programs>

### **Need CPE**

Review the Technical Events from our Chapter as well as our associate Chapters and Organizations. Information is detailed in Associate Organization Section of this newsletter.

### **Informational Articles to Assist Your Career!**

**"3 Hiring Tips in a Tight Candidate Market"** [Link](#)



Hiring for your team is always a daunting process especially in a tight candidate market.

Today, hiring managers are facing the challenge of finding qualified candidates given the low unemployment rate as well as fewer people (between Baby Boomers and Generation X). Here are three tips to help secure the talent you need in this market:

#### **1) Company Attraction**

Besides the actual job opportunity, what does your company have to offer a potential candidate? Be able to articulate the key attributes of your organization to attract talent. For instance, being a leader in your industry, community involvement, transparent communication, learning opportunities, fairness, fun environment, etc.

#### **2) Hiring Process Length**

Once you locate exceptional candidates, do not lose them with a long, drawn out hiring process. It's important to communicate the hiring process upfront and ensure that communication takes place at every stage. The interviewers need to make the commitment to be available to avoid unnecessary delays. Also, making sure you use technology to streamline the process whether that begins with a telephone interview or skype interview if someone is out of the office. Candidate Follow Up

#### **3) Candidate Follow Up**

From resume to offer letter, be sure to keep engaged with the prospective candidate. Provide timely feedback after the interview, set up next steps, share company information, etc. while you are in the interview stages. Also, once hired make sure you keep them excited about joining your company. You can take them to lunch, let them know their laptop/phone have been ordered, share press releases, etc.

At this time, talent is tight. Be sure that your company is adjusting to meet the difficult hiring climate. Good luck!

Tricia Scalzo, Executive Recruiter at BayWorks Recruiting



**Robert Half (Accountemps)** has provided the following articles on

**"5 New Manager Tips That Can Help Experienced Leaders Succeed, Too".** [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.

### **About EB-NC**

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

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

# East Bay - Northern California

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

The Chapter's 2019-2020 Board of Director's Elections and Appointments document has been submitted to IMA Global on March 29, 2019.

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

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

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

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

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

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

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

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

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

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

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

If you are interested in being on the Chapter Board of Directors, one may still submit your information (Include a short paragraph detailing why you would like to be on the Board), we encourage you to contact:

Mike Gorski, EB-NC President at [eastbaync@imachapter.org](mailto:eastbaync@imachapter.org) or Robert Hulin at [ima.eastbay.nc@gmail.com](mailto:ima.eastbay.nc@gmail.com).

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

Mike Gorski	President
Mike Gorski	Past President
(Open)	Administration VP
(Open)	Communication VP
(Open)	Prof. Education VP
William Sievers	Membership VP
Robert Hulin	Treasurer
(Open) Mike Gorski	Secretary
Tricia Scalzo	Director of FMN Program
William Sievers	Director of CMA Program
Pankaj Pandey	Director: Investment Committee
William Sawyer	Director: Investment Committee
Chung Bothwell	Director: Investment Committee
Kevin Clancy	Director of Social Media
Chung Bothwell	Director of Community Services
Ken Shepard	Director of Young Professionals
(Open)	Director of Student Services
Sherry Morse	Director at Large (Advisory only)
Robert Hulin	Chapter Webmaster

# East Bay - Northern California

## Chapter Calendar

<u>Date</u>	<u>Event</u>	<u>CPE</u>	<u>Time</u>	<u>Location</u>
<b>2019</b>				
02 Apr	Cultivating a Bias-Free Workplace (Revamp)	1.5	10:00 AM	Leadership Academy
10 Apr	The Future of Accounting Is Now	1.0	10:00 AM	Inside Talk
13 Apr	Financial Management Network	4.0	9:00 AM	Pleasanton, CA
16 Apr	The CMA Exam: Test-Taking Tips & Strategies	1.0	7:00 AM	Leadership Academy
17 Apr	Taming the T&E Beast: Visibility, Benchmarking, and Control	1.0	10:00 AM	Inside Talk
18 Mar	<b>2019-20 Board of Directors Request—Close Date</b>	0		
18 Apr	EB-NC IMA Board Meeting	0	5:30 PM	Zoom
22-24 Apr	COSO Internal Control—Integrated Framework Live Workshops	30		Montvale, N.J
24 Apr	Best Practices for ASC 842 Lease Accounting: What Controllers and CFOs Need to Know	1.0	10:00 AM	Inside Talk
24 Apr	AFWA: "WEDNESDAY "WINE DOWN" AFTER TAX WINE TASTING "	0	6:00 PM	Walnut Creek, CA
25-26 Apr	COSO Enterprise Risk Management Live Workshops	20		Montvale, N.J
27 Apr	Excel in Accounting: How to Pass Excel 2016 Specialist & Expert	2.0	9:00 AM	Oakland, CA
07 May	Facilitation Skills	1.5	10:00 AM	Leadership Academy
06 Jun	Financial Leadership (New)	1.5	10:00 AM	Leadership Academy
15-19 Jun	IMA's Annual Conference & Expo	30+		San Diego, CA
14-16 Nov	IMA's Student Conference			Charlotte, NC
<b>2020</b>				
20-22 Feb	REST 2020	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

**April 18, 2019: 5:30 PM to 6:30 PM**

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

Join Zoom Meeting

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

One tap mobile

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

+14086380968,,5628614823# US (San Jose)

Dial by your location

+1 669 900 6833 US (San Jose);

+1 408 638 0968 US (San Jose);

+1 646 876 9923 US (New York)

Meeting ID: 562 861 4823

Please notify Mike Gorski at [eastbaync@imachapter.org](mailto:eastbaync@imachapter.org) if you plan on attending.

# East Bay - Northern California Education

## Financial Management Network

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

Continuing Professional Education: 4.0 Hour CPE



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

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

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

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

Sponsored By:



## Certification

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

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

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

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

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

These are the topics deleted from test

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

[\(More Information\)](#)

# East Bay - Northern California Education

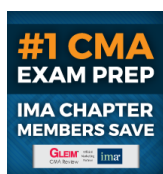
## Certification (cont.)

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

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

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

## Gleim Study Materials



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

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

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

Premium Review System (SET): \$1,249.00 retail and \$936.75 with the 25% IMA Chapter Discount

Premium Review System (PART): \$750.00 retail and \$562.5 with the 25% IMA Chapter Discount

Traditional Review System (SET): \$1,049.00 retail and \$891.65 with the 15% IMA Chapter Discount

Traditional Review System (PART): \$625.00 retail and \$531.25 with the 15% IMA Chapter Discount

CPE is 15% off of 20 hours or more

## Wiley Study Materials

Wiley CMAexcel has teamed up with IMA® (Institute of Management Accountants) to offer you great savings to kick off the New Year! For a limited time, save 20% on any [Wiley CMAexcel product](#), including the popular [Wiley CMAexcel Platinum CMA Course](#), and also receive 25% off your CMA® (Certified Management Accountant) entrance fee and IMA membership\* — a potential savings of up to \$500!

Don't wait to save – this offer expires on **April 1**.

\*25% off applies to IMA membership and CMA entrance only. Offer not valid for IMA membership renewals or CMA exam registrations. A discount code for 25% off your CMA entrance fee and IMA membership will be sent after your purchase of Wiley CMAexcel products.



IMA's Certification for  
Accountants and  
Financial Professionals  
in Business

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



Certified in Strategy  
and Competitive  
Analysis

The CSCA™ (Certified in Strategy and Competitive Analysis) is a specialty credential designed specifically for CMAs\*, which complements and expands upon the strategic planning and analysis skills developed through the CMA® (Certified Management Accountants) certification. To find out more from IMA click [here](#)

# East Bay - Northern California Education

## Microsoft EXCEL 2010 Microsoft Excel Presentations



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

Session Criteria:

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

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

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

My Study Material included:

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

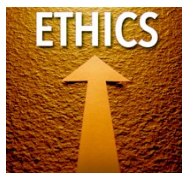
The official Microsoft MOS 2016 Study Guide 77-728 Paul McFedries [Amazon Link](#)

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

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

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

## Ethics 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
- The House Out of Control

### **Individual Ethics Courses:**

- Blinded by Pressure
- Misplaced Trust / Devastating Fraud
- The Slippery Slope of Greed
- 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
- 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 John [Hallett](#) or [Mike Gorski](#).



# East Bay - Northern California Community Relations / Student Relations

## Student Relations



**EAST BAY** Rising in the East



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

### IMA DAY

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

### SCHOLARSHIPS

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

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

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

### STUDENT SPEAKER TEAM

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

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

## EB-NC Student Scholarship Criteria

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

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

## 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



# 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 March 2019

Ms. Tabatha R. Sloggett	Regular	03/27/2019
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### New Members (Transfers In) March 2019

Mr. Brian G. Carlson, CMA	Regular	03/14/2019
Mr. Mark A Starrett, CMA, CPA	Regular	03/14/2019
Mr Sudhanshu R. Parikh, CMA	Regular	03/18/2019

### 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
Mr. Donald C. Phelps	01/20/1994

### April 2019 Anniversaries

Mr. James W. Partridge	04/01/1956
Mr. Stanley Rosch	04/01/1959
Mr. Harlan E. Kann	04/01/1970
Ms. Sherry A. Morse	04/01/1980
Mr. James A. Habegger	04/01/1982
Ms. Bobbi V. Mattos, CMA	04/01/1982
Mr. Jack L. Krasner, CMA	04/01/1983
Ms. Robyn A. Hegarty	04/01/1990
Mr. John M. Zukoski, CMA, CFM	04/27/1999
Mr. John L. Hallett, Jr.	04/26/2002
Ms. Yu Chih H. Cooley, CMA	04/30/2002
Mr. Tad C. Miller, CMA, RTRP	04/29/2009
Mr. Keith A. Darby, CMA, CSCA, CAE, CFE	04/29/2010
Ms. Uma Iswarya Shalini Irulappan Natarajan	04/18/2012
Mr. Christian Earl Edoria, CMA	04/25/2013
Ms. Ina-Katrin Stahl	04/21/2014
Ms. Esther Cho, CMA	04/22/2015
Ms. Madhura Joshi, CMA	04/30/2015
Mr. Jeremy Joseph Nau, CMA	04/12/2016
Ms. Jaime Sneade	04/11/2018

# 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 18, 2019 - Leadership Training and Annual Meeting

**LOCATION:** Holiday Inn, Dublin-Pleasanton, 6680 Regional St, Dublin, CA 94568

[Map](#)

If lost - call (408) 309-1333

**Cost:** \$40.00 per person for Training & Lunch

Please contact Nicole Sheets (408) 309-1333 of your meeting attendance.

## Reno Educational Seminar and Training

### February 20-22, 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: **TBA**

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

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

### REST Scholarships

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

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

## ABOUT IMA

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

Management accountants belong at IMA.

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

## IMA Nominating Committee Announces Paul E. Juras, CMA, CPA, Ph.D., Fiscal 2019-2020 Chair-Elect



The Nominating Committee of IMA® (Institute of Management Accountants) is pleased to announce that **Paul E. Juras, CMA, CPA, Ph.D.**, has been named Chair-Elect for IMA's fiscal 2019-2020 period (July 1, 2019 to June 30, 2020).

Juras is the Vander Wolk Professor of Managerial Accounting and Operational Performance at Babson College, where he teaches managerial accounting and strategic cost management courses in the M.B.A. and undergraduate programs. Before joining the Babson faculty, Juras taught at Wake Forest University. He earned his Ph.D. from Syracuse University and both his B.B.A. and M.B.A. from Pace University.

Juras' area of expertise is strategic management accounting. He has published articles in numerous periodicals, including the *Journal of Corporate Accounting and Finance*, *Issues in Accounting Education*, *The CPA Journal*, and *Strategic Finance*, and his current research interests focus on contemporary cost management systems. Juras also has co-authored a cost management textbook as well as numerous case studies with a cost management perspective. In addition, he has consulted with various corporations and public accounting firms.

Juras has provided service to IMA in various roles, including as a member of the Global Board of Directors, chair of the ICMA Board of Regents, chair of the IMA Research Foundation, and chair of the Performance Oversight and Audit Board Committee. He also spent 10 years as associate editor of the IECJ® (IMA Educational Case Journal). In 2015, he received IMA's R. Lee Brummet Award for Distinguished Accounting Educators.

## Connect. Network, and Grow

### Welcome to myIMA Network

#### Great benefits for members

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

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

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

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

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

[Visit MyIMA Network Now](#)

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

# Institute of Management Accountants

## Webinars

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

*Webinars are open to IMA Members Only.*

[April 02, 2019](#)

**Cultivating a Bias-Free Workplace (Revamp)**

Leadership Academy

10:00 AM - 11:30 AM PT

[April 10, 2019](#)

**The Future of Accounting Is Now**

Inside Talk

10:00 AM - 11:00 AM PT

[April 16, 2019](#)

**The CMA Exam: Test-Taking Tips & Strategies**

Leadership Academy

07:00 AM - 08:00 AM PT

[April 17, 2019](#)

**Taming the T&E Beast: Visibility, Benchmarking, and Control**

Inside Talk

10:00 AM - 11:00 AM PT

[April 24, 2019](#)

**Best Practices for ASC 842 Lease Accounting:  
What Controllers and CFOs Need to Know**

Inside Talk

10:00 AM - 11:00 AM PT

[May 07, 2019](#)

**Facilitation Skills**

Leadership Academy

10:00 AM - 11:30 AM PT

[June 06, 2019](#)

**Financial Leadership (New)**

Leadership Academy

10:00 AM - 11:30 AM PT

Click here to register for the webinars:

[IMA Webinars](#)

## 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, 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.

April 27, 2019

How to Pass Excel 2016 Specialist & Expert Certification Test

Presented by: John Hallet - Certified Excel Expert

Session will cover how to prepare for the Excel Expert Certification Exam

Click [here](#) to register.

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

**Cost:** Free

**Location:**

Robert Half

1999 Harrison Street #1000, Oakland, 94612

[map](#)

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

Sat Jun 22, 2019

[Pivot Tables/Pivot Charts](#)

Sat Jul 27, 2019

[Dashboards, Charts & Graphs](#)

Sat Aug 24, 2019

[Functions & Formulas](#)

Sat Sep 28, 2019

[Intro to Macros, Macro Recorder](#)

Sat Oct 26, 2019

[Power Query](#)

## AFWA

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

April 24, 2019 from 6:00 PM to 8:00 PM (PDT)

WEDNESDAY "WINE DOWN" AFTER TAX WINE TASTING

Event to be held at the following location:

Buon Vino 1545 Locust Street, Walnut Creek, California 94596

[View Map](#)

Attention Ladies in Accounting and Finance!

On April 24th will you be glad you survived another tax season? Want to come have a private wine tasting with friends while we try some delicious wines? We thought so. Join us! AFWA welcomes you to join us for our Wednesday Wine Down after Tax Season Tasting at Buon Vino in Walnut Creek. 6-8 pm for some fun games, Networking, wine tasting and relaxation.

[REGISTER](#)

## 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.

April 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 2018-19 Board of Directors

President	Michael Gorski
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Please contact Board Members via [eastbaync@imachapter.org](mailto:eastbaync@imachapter.org).



The Association of  
Accountants and  
Financial Professionals  
in Business

EAST BAY-NORTHERN CALIFORNIA CHAPTER