

THE READ INK

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

President's Message

East Bay Chapter Members and Friends,

Mark your calendars. It's time to celebrate the IMA Centennial!

As mentioned in last month's newsletter, this is a historic year for the IMA as we celebrate its Centennial. 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 on the waterfront at 6 PM on Saturday night, November 10th, at Scott's Seafood in Jack London Square – Oakland.

This is an **IMA East Bay - Northern California sponsored event**. Come enjoy the fine food, casual conversation, and harbor views. 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.

Save the date!

When: Saturday
November 10, 2018
6 PM to 9 PM

Where: Scott's Seafood
Jack London Square
2 Broadway
Oakland, CA 94607
<https://scottsils.com/>



The Association of
Accountants and
Financial Professionals
in Business

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

Mike Gorski
President 2018-19
East Bay - Northern California Chapter
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 to learn more.

SAVE THE DATE

The East Bay—Northern California Chapter will be hosting a 100 Year Celebration Event on Saturday November 10, 2018 at Scott's in Jack London Square. Be on the lookout for additional information on this event.

CMA Gleim (Ends July 31, 2018)

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 our associate Chapters and Organizations. Information is detailed in Associate Organization Section of this newsletter.

East Bay—Northern California Website

Hopefully you have accessed this Newsletter thru our redesigned Website, <http://eastbaync.imanet.org/>. There was a need to align IMA's brand across all lines of business. What is the IMA? How do members or potential members relate to the brand? The new website clearly showcases the IMA's brand. If you have any suggestions, comments, or changes that should be included, please let the Webmaster know.

Informational Articles to Assist Your Career!

Robert Half (Accountemps) has provided the following articles on

"How to Deal with Difficult Employees". [Link](#)

"Onboarding Consultants: 6 Ways to Help Set Up Successful Engagements". [Link](#)

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

East Bay - Northern California

Chapter Calendar

<u>Date</u>	<u>Event</u>	<u>CPE</u>	<u>Time</u>	<u>Location</u>
2018				
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
11 Aug	Financial Management Network	4.0	9:00 AM	Pleasanton, CA
16 Aug	EB-NC IMA Board Meeting	0	5:30 PM	GoToMeeting
18 Aug	GWC Quarterly Meeting	0	10:00 AM	Modesto, CA
20 Aug	The CMA Exam Essays: Everything You Need to Know!	1.0	7:00 AM	Inside Talk
21 Aug	Solving Hiring Challenges with Technology – 2018 Survey Findings & Insights	1.0	10:00 AM	Inside Talk
25 Aug	Excel in Accounting: Dashboards, Charts & Graphs	2.0	9:30 AM	Oakland, CA
27 Aug	Be Strategic or Be Gone: Developing Your Strategic Thinking and Planning Capabilities	1.0	10:00 AM	Strategic Management
28 Aug	Expense Management: How 2018 Trends Affect Your Company	1.0	10:00 AM	Inside Talk
06 Sep	Generate Buzz About the CMA	0.0	7:00 AM	Webinar
06 Sep	Generate Buzz About the CMA	0.0	1:00 PM	Webinar
20 Sep	EB-NC IMA Board Meeting	0	5:30 PM	GoToMeeting
18 Oct	EB-NC IMA Board Meeting	0	5:30 PM	GoToMeeting
01-03 Nov	IMA's Student Leadership Conference			St. Louis, MO
10 Nov	EB-NC Chapter 100 Year Anniversary Event	0	6:00 PM	Scott's Seafood Oakland, CA
15 Nov	EB-NC IMA Board Meeting	0	5:30 PM	GoToMeeting
16-17 Nov	GWC Quarterly Meeting and Training	8		Honolulu, HI
2019				
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

August 16, 2018: 5:30 PM to 6:30 PM

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

<https://global.gotomeeting.com/join/243891309>

You can also dial in using your phone.

United States: +1 (786) 535-3211

Access Code: 243-891-309

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

East Bay - Northern California Education

Financial Management Network

August 11, 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?

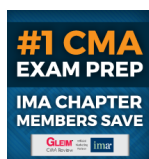
The find out the answers to these questions and more, please look for our future announcement on attending the GoToMeeting Presentation . If interested please contact William Sievers at William.Sievers@wsp.com.

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!

CMA Gleim (Ends July 31, 2018)



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](#)

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 or contact Alexandra Graham at 800.874.5346 Ext. 428 or by email at 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 or call 925-285-5824. This is an member benefit to you as an active EB-NC Chapter member

Introducing a new Excel Course presented by Mr. Excel

IMA is proud to introduce our new online Excel Course [IMA Excel: Data Analytics – Leveraging Excel](#). Renowned author and Excel expert Bill Jelen will present in this online, self-study, video-based tutorial session. This course is available 24/7 allowing you to learn at a time and pace that is convenient for you. Downloadable practice worksheets are provided to refine your skills. Passing the final exam will enable you to earn 3.5 NASBA CPE credits. To learn more click [here](#).

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 or Mike Gorski 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 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. 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.

East Bay - Northern California Membership

Member Profile

Name: Sherry A. Morse



Sherry is currently an advisor to the East Bay - Northern California Chapter Board of Directors and has been a member of the IMA since 1980.

Sherry brings more than 30 years of experience as a financial professional including audit, treasury, financial management, financial reporting, tax and compliance functions to support strategically-focused decision making within organizations. As a key member of blueSky management, she has primary day-to-day responsibility for planning, implementing, managing and controlling all financial-related activities by insuring proper focus on accounting, internal controls, cash planning and staff management. Previously, she served as Financial Officer of companies in both the insurance and legal professions and started her career as an Auditor with Deloitte, one of the "Big Four" CPA firms.

Sherry has a Bachelor of Science Degree in Business Administration, Accounting Option from Cal State University, Hayward. She has a CA Life and Disability Insurance License (Inactive), is a Past National VP of the Institute of Management Accountants, Past President of Soroptimist International and served on the board of Pleasanton Partnerships in Education for over 10 years. Her favorite past time is being with her family!!

Title: CFO/Corp Secretary-Treasurer;

Company: blueSky Marketing Group, Inc.

Education: BS degree in Business Administration, Accounting Option from Cal State University, HAYWARD!

Residence: Pleasanton, CA

Why IMA?

As a senior in college, I asked faculty if there were any organization around that I might get involved with as a student. I was referred to Gary Yamashita who was the chair of the business dept. and a member of IMA. He recommended I attend a meeting. I did and met previous students there and also met one of the recruiters for Deloitte who was a member. We talked and when I went for my on-campus interview for Deloitte, the recruiter knew I was involved with IMA. I often say that NAA (at the time) helped me get my job with Deloitte. I then attended a board meeting and the rest was history!

Business Philosophy

Basics: Be honest; be ethical; be polite; and know that there usually isn't any mistake that can't be corrected after the fact so chill!

Best way to keep competitive edge: Be the best at what you do and of course, be honest!!

Your guiding principle: Be honest and ethical and give back to your community; engage in life-long learning!

Self-portrait:

First Job: Early years: baby-sitting; taught piano; worked on campus at university; first after college: Staff Accountant, Deloitte.

Word best describes you best: Tenacious with a smile!

Best about job: Flexible; challenging; professional; constant learning to keep up!

Pet Peeve: Bad drivers!

Most important lesson: Always be willing to teach something you know to anyone;

Person Most Interested in Meeting: My mother (I was 11 when she died)

Three greatest passions: My family; music; learning stuff

Judgment Calls:

Best business decision: Working for a Big 8 accounting firm;

Toughest business decision: Leaving Deloitte to raise my children;

Biggest missed opportunity: What might have been at Deloitte; but also ended up being best opportunity of my life-raising my children and being self-employed with my husband.

Acquired Taste:

Status symbol: Don't believe in them;

Favorite movie: too many to mention;

Favorite book: The play – "Our Town" by Thornton Wilder;

Favorite restaurant: Anyplace with good food

Favorite vacation spot: anyplace with my family

Set of Wheels: I drive a Hyundai Sonata – BUT – I refused to ever own a van or station wagon!!! And I never did, even with kids!!

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

August 2018 Anniversaries

Mr. Donald C. Watkins	08/01/1980
Mr. Jon Parkinson, CMA	08/18/1993
Mr. Robert F. Hulin, Jr	08/22/1994
Mr. Beneberu Derebie, CMA	08/07/1996
Ms. Tricia A. Scalzo	08/21/1997
Mr. Timothy W. Everson, CMA	08/26/2003
Ms. Richa Pokharel, CMA	08/05/2015
Ms. Suzanna Buckhalter	08/04/2017
Mr. John C. Hardin	07/01/1982

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) 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.

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

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 Names Ginger R. White as Chair of Global Board of Directors and Linda Devonish-Mills as Director of Diversity and Inclusion

Montvale, N.J., July 24, 2018 – [IMA](#)® (Institute of Management Accountants) announced today the appointment of Virginia “Ginger” R. White, CMA, CSCA, as Chair of IMA's Global Board of Directors for its 2018-2019 fiscal year and Linda Devonish-Mills, CMA, CPA, CAE, as its first director of diversity and inclusion.

As Chair, IMA's most senior volunteer role, White will focus on three major initiatives: reaching students, advancing women in the profession and maintaining the relevancy of the profession in the face of unprecedented technological change. She is the fifth woman to hold that position. White will also serve as chair of IMA's Governance Committee and as a member of the Nominating Committee. White is employed by Cummins Inc. as corporate purchasing finance director.

Devonish-Mills, in the new director of diversity and inclusion staff role, will help facilitate, guide and champion the strategic integration of diversity and inclusion into every aspect of IMA's member and corporate experience. A member of IMA's staff since 2006, Devonish-Mills was
(Continued on page 11)

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.

[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

[August 08, 2018](#)

Got Balance? Streamline Your Account Reconciliations Inside Talk
10:00 AM -11:00 AM PT

[August 20, 2018](#)

The CMA Exam Essays: Everything You Need to Know! Inside Talk
10:00 AM -11:00 AM PT

[August 21, 2018](#)

Solving Hiring Challenges with Technology – 2018 Survey Findings & Insights Inside Talk
10:00 AM -11:00 AM PT

[August 27, 2018](#)

Be Strategic or Be Gone: Developing Your Strategic Thinking and Planning Capabilities Inside Talk
10:00 AM -11:00 AM PT

[August 29, 2018](#)

Expense Management: How 2018 Trends Affect Your Company Inside Talk
10:00 AM -11:00 AM PT

[September 06, 2018](#)

Generate Buzz About the CMA IMA Webinar
07:00 AM - 08:00 AM PT [Click here](#) to register/and join.
01:00 PM - 05:00 PM PT [Click here](#) to register/and join.

Click here to register for the webinars:

[IMA Webinars](#)

Institute of Management Accountants

(Continued from page 10)

previously IMA's director of technical accounting activities, where she informed IMA members and external stakeholders about the latest technical accounting issues affecting the profession.

"It's of upmost importance to IMA that each and every one of our stakeholders, regardless of personal background, experience an inclusive environment not just with IMA, but also within their own organizations," said Jeff Thomson, CMA, CSCA, CAE, IMA president and CEO. "Ginger and Linda are two individuals who are dedicated to furthering that reality and we are grateful for their service to the profession."

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](#)

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.

August 25, 2018

Dashboards, Charts, and Graphs

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 Sep 29, 2018 [Tools Tips Tricks & Traps \(Preview\)](#)

Sat Oct 27, 2018 [Functions and Formulas](#)

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.

August 2018

No Technical Program Scheduled

Diablo Valley Chapter of the IMA

August 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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The Association of
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