

THE READ INK

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

President's Message

East Bay Chapter Members and Friends,

Hope Everyone had a great Labor Day Weekend

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



The Association of
Accountants and
Financial Professionals
in Business

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

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

SAVE THE DATE

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.

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

CMA EXAM REVIEW PRODUCTS

The #1 CMA Exam Prep

Gleim Products:

GLEIM PREMIUM CMA REVIEW SYSTEM

GLEIM TRADITIONAL CMA REVIEW SYSTEM

GLEIM CMA MEGA TEST BANK

Chapter Members receive a discount from Gleim on these products.

To Review and do a comparison of the different Gleim Products, 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

"Get on Target: Is Your Firm Ready for the New Lease Accounting Standard?". [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				
05 Sep	Improving Back Office Productivity	1.0	10:00 AM	Inside Talk
06 Sep	Generate Buzz About the CMA	0.0	7:00 AM	Webinar
06 Sep	Building Your Leadership Brand: Delivering on Your Brand Promise	1.5	10:00 AM	Leadership Academy
06 Sep	Generate Buzz About the CMA	0.0	1:00 PM	Webinar
08 Sep	Financial Management Network	4.0	9:00 AM	Pleasanton, CA
13 Sep	7 Best Practices for Pain-free Global Supplier Payments	1.0	7:00 AM	Inside Talk
17 Sep	Data Visualizations Decoded	1.0	10:00 AM	Inside Talk
20 Sep	EB-NC IMA Board Meeting	0	5:30 PM	GoToMeeting
20 Sep	Performance Reporting: The Holy Grail of Finance	1.0	10:00 AM	Inside Talk
22 Sep	Excel in Accounting: Tools, Tips, Trick, & Traps	2.0	9:30 AM	Oakland, CA
02 Oct	Global Leadership	1.5	10:00 AM	Leadership Academy
10 Oct	What is GDPR and why should I care?	1.0	10:00 AM	Inside Talk
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 Celebration	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

September 20, 2018: 5:30 PM to 6:30 PM

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

<https://global.gotomeeting.com/join/978283109>

You can also dial in using your phone.

United States: +1 (312) 757-3121

Access Code: 978-283-109

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

Please notify Mike Gorski at mgorski1761@yahoo.com if you plan on attending.

East Bay - Northern California Education

Financial Management Network

September 8, 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 ?

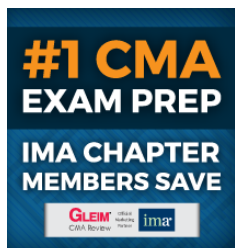
- Why pursue the CMA?
- What are the benefits of getting it?
- How should one prepare for the examination?
- What is the outline of the test and what do sample questions look like?

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!



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.

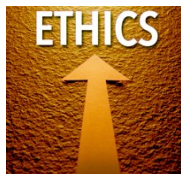
Interested: Contact John Hallett at jhallett@well.com or call 925-285-5824. This is an member benefit to you as an active EB-NC Chapter member

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 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.

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 August 2018

Mr. Duc Tran	Regular	08/17/2018
Mr. Juan Elio Rodriguez Gomez	Regular	08/26/2018

Members - Received CMA / CSCA

Ms. Ying Zhao, CMA	08/23/2018
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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

September 2018 Anniversaries

Ms. Chung T. Bothwell	09/01/1978
Mr. Karl F. Meyer, CMA	09/01/1981
Ms. Mary-Ann E. Wolfenden, CMA	09/07/1993
Mr. Miguel Zuliani, CMA, CFM	09/20/1995
Mr. Glen S. Uhland, CMA	09/04/1996
Ms. C. Chingyi Wu	09/18/1997
Mr. Craig B. Johnson, CMA, CFM, CPA	09/23/1997
Mr. Gregg Rubenstein, CMA, CPA	09/02/1999
Ms. Karen E. Brant	09/06/2001
Ms. Elizabeth (bebe) Bertolet Hillegass	09/20/2012
Mr. Zachary Otting	09/02/2015
Mr. S Jay Jairam, CPA, CISA, CIA	09/15/2016
Mr. Bradley Steven Virchis	09/29/2016
Mr. Hughes Chiang, CMA	09/06/2017
Ms. Elizabeth Marcel	09/25/2017
Ms. Marfel Lenon	09/29/2017

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) 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

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

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 Privacy Policy

Updated: May 2018

Introduction

IMA® (Institute of Management Accountants) is the association of accountants and financial professionals in business. Provided below is our Privacy Policy to explain how we collect, use, disclose, transfer, and store your personal data. We use your personal data to better serve you by providing an efficient, meaningful, and customized experience. When you use IMA products and services, you agree to accept our policy, as well as our agreements. You can manage your information and privacy settings by visiting your IMA profile at [myIMA](#).

We encourage you to read this Policy before using this website(s) and providing your personal data to us. IMA knows that you care about how your information is used and shared and believe in protecting your privacy and the confidentiality of your Personal Information. Your use of our websites signifies that you understand and agree with all practices and terms of this Policy.

What Information Does IMA Collect?

IMA collects data from members and customers with the intention of providing the best level of service. It is our overall policy to collect only personally identifiable information that you knowingly provide. The types of personal information we collect may include your name, postal address, email address, phone number, gender, date of birth, education and employment infor-

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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.

September 05, 2018

Improving Back Office Productivity

10:00 AM -11:00 AM PT

Inside Talk

September 06, 2018

Generate Buzz About the CMA

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.

IMA Webinar

September 06, 2018

Building Your Leadership Brand: Delivering on Your Brand Promise

10:00 AM -11:30 AM PT

Leadership Academy

September 13, 2018

7 Best Practices for Pain-free Global Supplier Payments

10:00 AM -11:00 AM PT

Inside Talk

September 17, 2018

Data Visualizations Decoded

10:00 AM -11:30 AM PT

Inside Talk

September 20, 2018

Performance Reporting: The Holy Grail of Finance

10:00 AM -11:00 AM PT

Inside Talk

October 02, 2018

Global Leadership

10:00 AM -11:00 AM PT

Leadership Academy

October 10, 2018

What is GDPR and why should I care?

10:00 AM -11:00 AM PT

Inside Talk

Click here to register for the webinars:

[IMA Webinars](#)

Institute of Management Accountants

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mation, and professional designations achieved. We may collect additional personal information from you on occasion as needs arise. Any personal data you provide will enable us to keep you informed, process your requests, or offer services to you with respect to our programs, products, and services.

IMA always strives to use in-house and/or standard marketing analytic tools within our platforms to better serve our customers. We may collect non-personally identifiable information (i.e., information of an anonymous nature) such as device type, browser type, operating system, page views, usage, and similar data from your visits to our websites.

When a visitor performs a search within our websites, IMA may record information identifying the visitor or linking the visitor to the search performed. We may also record limited information associated with every search request made by a visitor. That information is used to, among other things, solve technical problems with the service and to calculate overall usage statistics.

How Does IMA Use My Data?

IMA uses information voluntarily submitted by members and customers in the following ways:

- To provide you with programs, products, services, or information you have requested from IMA
- To develop new and improved services by analyzing demographic or usage trends and by measuring demographics and interests regarding specific areas of IMA (including the website)
- To communicate with you about your IMA account
- To process payments, including membership dues, registration and exam fees, subscriptions, voluntary contributions, and products and services. IMA is compliant with the data security standards of the payment card industry (PCI-DSS compliant)
- To administer our certification programs, examination scheduling, and registration processes with our partner exam providers
- To manage your participation in IMA governance activities, such as Global and local Boards, Standing Advisory Committees, and other volunteer leadership roles
- To provide you with prompt and effective customer service
- To support the operations of IMA such as account maintenance and recordkeeping, troubleshooting problems, resolving disputes, and for internal controls and audits
- To inform you about programs, products, and services offered by IMA and/or its contracted business partners
- To provide advertisements that are consistent with IMA's organizational purpose
- To conduct surveys for IMA or on behalf of individual members performing scholarly research
- To carry out IMA's Ethics Compliance Policy and/or conduct investigations as required by law
- To promote networking between members

There are a number of different basis on which we will process your personal data, depending on the type of data and the purpose. Generally, we will process your personal data to provide you with the programs, products, services, and information that you have requested from us or where it is necessary to perform our contract with you (i.e., membership benefits). If none of these conditions apply, we may process your personal data in instances when it is in our legitimate interests and in alignment with the purposes defined in this Policy.

Unless a longer retention period is required by applicable laws or regulations, we will retain your information for as long as your IMA account is active, as well as for an additional period afterwards to cover any outstanding issues or queries that may arise in relation to your account. This period of retention is subject to our review and alteration.

How Does IMA Share or Disclose My Data?

IMA will not sell your personally identifiable information to anyone. IMA may disclose your personal data to third parties. Our third-party data processors are required to securely maintain your personal data, following regulations and best practices, and will use the data only as needed to support the delivery of services to you on IMA's behalf. Further, personal data will be disclosed only to contracted third-party service providers under the following categories:

Technology/Operations

Hosting facilities to securely store, transmit, and process your data

Technology solution providers who assist in the development of our software platforms

Credit card processors to securely process your payments to IMA

Compliance authorities we utilize for legal issues, audits, and tax purposes

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Institute of Management Accountants

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Mailing houses for the fulfillment of our products and services

Identity management providers for user access to confidential information

Legal authorities to comply with an inquiry made regarding a subpoena, warrant, or other court order

Marketing/Communications

Advertising, marketing, and social media providers to conduct targeted advertisements related to professional development and educational opportunities

Research providers who may conduct surveys and studies on behalf of IMA

Reporting and analytic tools to allow data mining and monitoring

Affiliate partners to provide special offers as a benefit to our members

Marketing automation solutions to provide outbound email marketing services

Product and Services

Third-party call centers to conduct outreach initiatives on behalf of IMA regarding our programs, products, and services

Learning platform providers who develop, host, and store information related to Continuing Professional Education (CPE) products

Professional certification providers for the delivery of digital badges and scheduling of IMA examinations

Online community platform providers to allow member/customer networking benefits

Event solution providers for the hosting and delivery of webinars and conferences, including onsite support

Verification purposes related to credentials from IMA/ICMA.

For more information regarding IMA's Privacy Policy in the following areas:

[How Does IMA Use Cookies?](#)

[Does IMA Collect Personal Data from Children?](#)

[International Data Privacy Protection](#)

[IMA's Security Measures](#)

[Subject Access/User Rights](#)

[EU Data Subject Rights](#)

[Third-Party Websites](#)

[Communication Preferences](#)

Please connect using this [link](#) to the IMA's Privacy Policy webpage.

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.

September 22, 2018

Tools, Tips, Trick, & Traps

9:00 AM - 11:30 AM

Experienced Excel users will share examples of common traps accountants or finance professionals may encounter and illustrate tools, tips and tricks to get around them. Quoting one of the founders of Excel in Accounting, "there are five ways to get a task done in Excel." This session, among other things, will teach you how to accomplish a task in multiple ways.

Session will cover:

- Productivity Tips
- Best Practices
- Shortcuts
- Navigating the Excel window
- Quick Access Toolbar
- Tools not on Ribbons
- New tools in Excel 2016 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 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.

September 2018

No Technical Program Scheduled

Diablo Valley Chapter of the IMA

September 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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