

# THE READ INK

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

## President's Message

### East Bay Chapter Members and Friends,

Happy Holidays!

Many thanks to all the members and the contributions they make to the organization. Whether it be an insightful blog they penned, a tweet they posted, a webinar they presented, or volunteering to help lead a chapter. The breadth and depth of expert knowledge sharing is unparalleled. One of the ways we as an organization can say "Thanks!" is to offer scholarships to our members for various educational events. One such event is the Reno Education Seminar and Training (REST).

REST is a two-and-a-half-day program which allows participants to select topics that directly influence their day-to-day professional lives. All while earning up to 22 hours of Continuing Professional Education (CPE) credits.

REST 2019 will be held February 21 – 23 in Reno, Nevada at the Atlantis Casino Resort Spa. And, our very own Golden West Council is awarding two \$ 450 scholarships to attend this event. The scholarship application form is on both the Golden West Council (GWC) and REST (REST) websites. Hurry though....the application deadline is fast approaching! Read more about the event in this month's newsletter.

Here's to a safe, happy holiday season and prosperous new year!

Mike Gorski  
President 2018-19  
East Bay - Northern California Chapter  
[eastbaync@imachapter.org](mailto:eastbaync@imachapter.org)



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

## Director of Social Media

### 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.

The East Bay Northern California needs your help!

We have a **Director of Social Media** that is open, the Chapter seriously needs to find a volunteer to fill this position **ASAP**.

This volunteer position will assist current board members in the use of social media. The board wishes to become fluent in the use of Twitter, Facebook, Pinterest, blogging, Instagram, Infographics and other social media.

We meet once a month and cover various subjects, one of them will be Social Media. That may take no more than probably 15 minutes of the 1-1/2 hour meeting.

In this position, you will be able to increase your strategic networking to meet CFO's, Director's, Managers and other finance and accounting people in their environment. These finance folks come from a variety of industries including recruiting, CPA firms, retail, manufacturing, government and Silicon Valley.

We are NOT looking for an accounting or finance expert..... just someone who is leaning towards accounting and finance direction for a career! Someone that does tweets, texting and Facebook in their daily routine and can teach others.

Please contact Mike Gorski, President at [eastbaync@imachapter.org](mailto:eastbaync@imachapter.org) if you are interested.

## Latest Information

### **Technical Meeting - December 6, 2018**

#### **"Economic Forecast 2019"**

**Speaker: Dr. Lawrence Souza**

Please click on the link below to Register

[Get more information](#)

[Register Now!](#)

[I can't make it](#)

More information on [Page 4](#) of this newsletter

### **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!

### **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!**

Robert Half (Accountemps) has provided the following articles on "Holiday Productivity Bump". [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>
<b>2018</b>				
04 Dec	Delegation Skills	1.5	10:00 AM	Leadership Academy
05 Dec	Best Practices for Building a Risk Assessment Framework in Finance Systems	1.0	10:00 AM	Inside Talk
06 Dec	EB-NC Tech Meeting: "Economic Forecast 2019"	1.0	6:00 PM	Holiday Inn Dublin, CA
8 Dec	Financial Management Network	4.0	9:00 AM	Pleasanton, CA
11 Dec	The CMA Exam: Navigating Multiple Choice Questions	1.0	7:00 AM	Inside Talk
12 Dec	Technology Trends Accountants, Controllers, and CFOs Need to Know	1.0	10:00 AM	Inside Talk
17 Dec	Preparing Your Business for Outside Investment	1.0	10:00 AM	Inside Talk
20 Dec	EB-NC IMA Board Meeting	0	5:30 PM	GoToMeeting
<b>2019</b>				
08 Jan	Embracing Change	1.5	10:00 AM	Leadership Academy
12 Jan	Financial Management Network	4.0	9:00 AM	Pleasanton, CA
17 Jan	EB-NC IMA Board Meeting	0	5:30 PM	GoToMeeting
21 Feb	GWC Quarterly Meeting	0	5:15 PM	Reno, NV
21-23 Feb	REST 2019	22.0		Reno, NV
15-19 Jun	IMA's Annual Conference & Expo	30+		San Diego, CA
14-16 Nov	IMA's Student Conference			Charlotte, NC

## 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

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

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

<https://global.gotomeeting.com/join/427174701>

You can also dial in using your phone.

United States: +1 (571) 317-3122

Access Code: 427-174-701

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

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

## East Bay - Northern California

### East Bay—Northern California 100 Year Event Review



The Association of  
Accountants and  
Financial Professionals  
in Business

Wow! What a great celebration the Chapter had on November 10, 2018



The Chapter had an attendance of 36 beautiful souls for the celebration. Unfortunately, we also had 10 no shows due to illness or other reasons.

Mike Gorski, started the celebration with the recognition of the Past Presidents of the Oakland-East Bay and Amador Valley Chapters, the CMA's, CFM's and CPA's in the audience.

It was an evening of good comradery, good food, games of chance and trivia, and the development of new relationships and reinvigorating of old ones. There was a great speech by Mr. Alex Eng, Chair Emeritus of IMA with the discussion on running and biking from SFO to Jack London Square. Just kidding. Alex discussed the impact of IMA and it's certifications had on him, his involvement with the IMA organization, and how participation in your local Chapter, Council, and Global Board can affect your career.

The evening concluded with the recognition of Sherry Morse and Tricia Scalzo with a bundle of flowers for their efforts on putting together this wonderful event. And the recognition with Past President Plaques for John Hallett (2016-2017) and Robert Hulin (2001-2003, 2011-2016).

If you have any questions about the event, feel free to contact Robert Hulin at

[ima.eastbay.nc@gmail.com](mailto:ima.eastbay.nc@gmail.com) Finally, thank you to those that attended and we look forward to seeing you at Chapter Event.

## East Bay—Northern California Technical Meeting December 06, 2018

### Economic Forecast 2019



**Speaker:** Dr. Lawrence Souza, DBA/CCIM/RICS/CRE

Dr. Souza has 25 years of experience in the commercial real estate industry. Prior to working as a Real Estate, Financial and Investment Economist for Pillar6 Advisors, LLC; Johnson Souza Group, Inc.; and Monetarex, Inc., Mr. Souza worked for New York Life Insurance Company/NYLIFE Securities as a Financial Services Professional; Charles Schwab Investment Management (CSIM) as Managing Director - Index Services; Chief Economist – Managing Director with Global Real Analytics (GRA); and Investment Advisor for Quantum Financial Network (QFN). Dr. Souza is a Registered Representative and Investment Advisor, Real Estate Consultant, and licensed California insurance agent and real estate investment broker providing economic and investment consulting services to retail and institutional real estate investors. He has also held senior positions in strategic portfolio research and analysis with BRE Properties, Metric Realty Advisors, Mellon-McMahan/MacFarlane Partners, Norris/Beggs & Simpson and Grubb & Ellis. Dr. Souza holds undergraduate and graduate degrees in several fields including: accounting, finance, economics, public administration, information systems and political science; and a Doctorate in Business Administration (DBA) with a concentration in Corporate Finance. His dissertation is titled: Modern Real Estate Portfolio Management (MREPM): Applications in Modern (MREPT) and Post-Modern (PMREPT) Real Estate Portfolio Theory. He has also been teaching college level courses for the past 19 years in Real Estate Principals, Finance and Development; Corporate Finance, Macroeconomics, Financial Institutions and Money and Banking, and Derivatives at Cal. State East Bay (Hayward), Golden Gate University (GGU), San Francisco (SFSU) and San Jose (SJSU) State University, Santa Clara University (SCU), University of San Francisco (USF), and Saint Mary's College (SMC). Dr. Souza is a Counselor of Real Estate (CRE), a Fellow of the Royal Institute of Chartered Surveyors (FRICS), and Certified Commercial Investment Member (CCIM); is a member of the American Real Estate Society (ARES), the American Real Estate and Urban Economics Association (AREUEA), and Urban Land Institute (ULI); has been mentor for the Robert Toigo Foundation; and has acted as an advisory board member for the Real Estate Research Institute (RERI), Bay Area Council (BAC)/University of Southern California (USC) Ross Program in Real Estate (San Francisco), Commercial Real Estate Women (CREW-SF) and Community Awareness and Treatment Services (CATS).

**Networking:** 6:00 PM **Dinner:** 6:30 PM **Speaker:** 7:00 PM **Scholarship Raffle & Wrap-up:** 8:30 PM

**Location:** Holiday Inn (Dublin)

6680 Regional Street  
Dublin, CA 94568  
(925) 574-7104

**Dinner Selection:** Grilled Salmon, Chicken Dijonaise, and Vegetable Lasagna

**How to get there:** Plane, train, automobile, horse, bicycle, foot ([Map](#))

**Cost:** \$25.00 Members and Guests; \$15.00 Students

**To Reserve:** [Click Here](#)

# East Bay - Northern California Education

## Financial Management Network

December 08, 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 ?

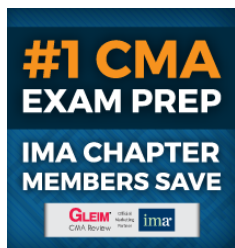
- Why pursue the CMA?
- What are the benefits of getting it?
- How should one prepare for the examination?
- What is the outline of the test and what do sample questions look like?

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](#).

# East Bay - Northern California Education

## Gleim Study Materials

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



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

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

## Microsoft EXCEL 2010 Microsoft Excel Presentations



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

- Session can be booked by any active EB- NC Chapter member.
- Only one session per member may be booked.
- No charge to the member, your company, or additional associates/guests.
- Request minimum of 5 attendees with no practical max.
- A room at the Member's location will be required with either AV system or ability to project slides on wall.
- Attendees may bring laptop and do Excel steps live or just follow along with presentation printouts.
- Are you a member of a non-profit or civic organization and think they might benefit from a session? Please

contact me to book session.

- Does your organization need Excel Power Pivot. No. This session may help decide if invest in Power Pivot is reasonable. Want to include attendees remotely? Of course! But the organization will need to set up Skype/WebEx availability.

This is the only free Excel session available to active EB-NC Chapter members; so please take advantage of it. Fair Warning: The last five minutes of the session will be a discussion on reasons to join IMA and get the Certified Management Accountant credential from the IMA. We will have brochures on both the IMA and the CMA certification.

Interested: Contact John Hallett at [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: [GMetrix 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](#)

Do NOT take the exam until you have gone over every practice question in both the G-Metrix program and Carshalton Advisory YouTube videos. Several Times.

I have two MOS 2016 books I will lend to anyone interested. First Come ... First Serve.

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

# 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

**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



**LAS POSITAS**  
COLLEGE

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

#### IMA DAY

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

#### SCHOLARSHIPS

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

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

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

#### STUDENT SPEAKER TEAM

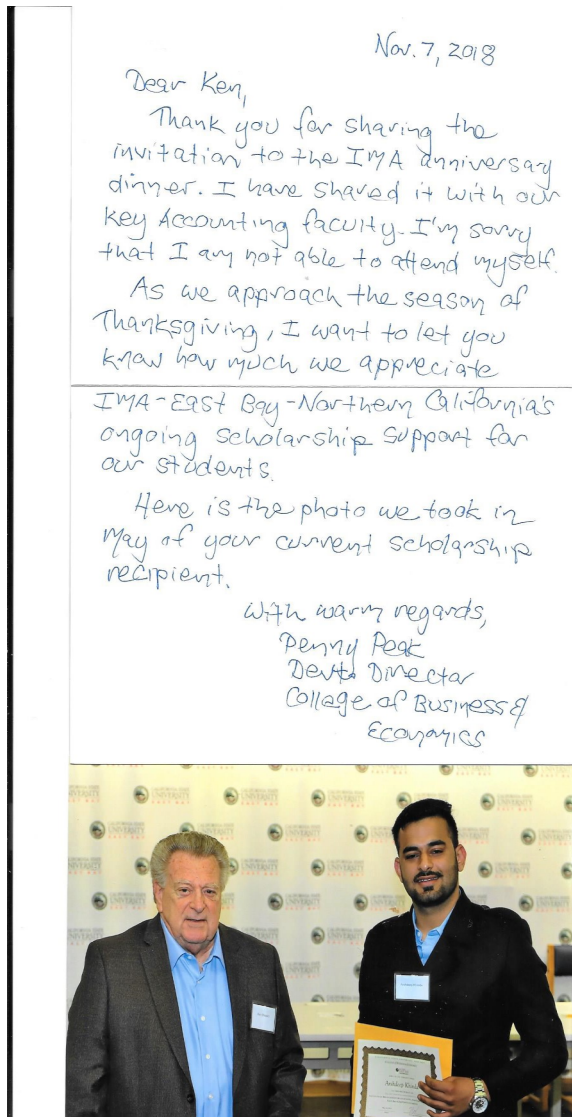
*For those of you who would like to help young students learn more about accounting and finance, we have a solution! We're putting together a small team of four or five professionals from the chapter who can visit community colleges as a team. This team will interact with the students in a very informal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

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



# East Bay - Northern California Community Relations / Student Relations

## Student Relations (Continued)



Note from Ms. Penny Peak, Director of Development, College of Business and Economics, CSU-EB for sharing information about the Chapter's 100 Year Anniversary. Included within the note is a photo of Ken Shepard, VP of Young Professionals and Arshdeep Kinda, Recipient of East Bay - Northern California's 2017-2018 CSUEB \$1,000.00 and 2 Year Membership in IMA Scholarship.

Mr. Kinda's goals: Long term goals are to run a CPA firm after gaining a couple of years' experience in some multinational company. In order to do that, actively participate in quite a few leadership and development workshops on and off campus to enhance my professional skills.

## 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 November 2018

Ms. Nghi Hoang Thi Tran	Regular	11/13/2018
Ms. Reanna Bradford	Regular	11/25/2018
Ms. Kathy Jones	Regular	11/26/2018
Ms. Amber K Leon	Regular	11/26/2018

### New Members (Transfers In) October/November 2018

Ms. Swetha Krishnan, CMA	Student	10/09/2018
Mr. Joshua Ballard, CMA, CFA	Regular	11/16/2018

### 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

### December 2018 Anniversaries

Mr. Alfred A Langosch	12/01/1952
Mr. Harold F. Edwards	12/01/1952
Mr. Mark D. Hutchison	12/01/1965
Dr. Gregory B. Merrill, CPA	12/01/1989
Mr. Joel S. Smith, CMA, CPA	12/01/1990
Mr. James D. Peterson, CMA	12/28/1994
Mr. Tim L. Gregory, CMA	12/12/1995
Mr. William J. Sievers, CMA	12/13/2000
Ms. Grace Kretchmer Erickson	12/05/2012
Ms. Swetha Krishnan, CMA	12/16/2014
Mr. James Welsh	12/30/2014
Mr. Jonathan D. Chan	12/03/2016
Mr. Tanimu Dasin Jr.	12/05/2016
Ms. Ying Zhao, CMA	12/04/2017
Mr. Mahim Bhattarai	12/13/2017

# 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.

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

### February 21, 2018 - Quarterly Meeting

LOCATION: **Atlantis Casino Resort Spa , 3800 South Virginia St. Reno, NV 89502**

TIME: 5:15 PM - 7:15 PM

COSTS: \$00.00

Please contact [goldenwest@imacouncil.org](mailto:goldenwest@imacouncil.org) for more information and to RSVP.

### May 18, 2019 - Leadership Training and Annual Meeting

LOCATION: **Pleasant Hill. CA**

## 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.



Location: Atlantis Casino Resort Spa,  
3800 South Virginia St., Reno, NV 89502

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

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

### REST Scholarships

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

Scholarship Committee  
Golden West Council of the Institute of Management Accountants  
C/O: Scott Berry  
Golden West Council VP Education  
[scottberry8@yahoo.com](mailto:scottberry8@yahoo.com)

# Institute of Management Accountants

## 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.

## 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.*

December 04, 2018

**Delegation Skills**

10:00 AM -11:30 AM PT

Leadership Academy

December 05, 2018

**Best Practices for Building a Risk Assessment Framework in Finance Systems**

10:00 AM -11:00 AM PT

Inside Talk

December 11, 2018

**The CMA Exam: Navigating Multiple Choice Questions**

07:00 AM -08:00 AM PT

Inside Talk

December 12, 2018

**Technology Trends Accountants, Controllers, and CFOs Need to Know**

10:00 AM -11:00 AM PT

Inside Talk

December 17, 2018

**Best Preparing Your Business for Outside Investment**

10:00 AM -11:00 AM PT

Inside Talk

January 08, 2019

**Embracing Change**

10:00 AM -11:30 AM PT

Leadership Academy

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.

December 2018

No Technical Program Scheduled until February 2019

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

**Location:**

Robert Half

1999 Harrison Street #1000, Oakland, 94612

[map](#)

## 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.

December 2018

No Technical Program Scheduled

## 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.

December 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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