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Joplin Tri-State Chapter

Program Roster

2017 - 2018

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The Presidents Letter



Welcome to our 2017-18 Chapter Roster! Our Chapter mission is to “provide tri-state accountants and financial professionals opportunities to develop, network and advance in their careers; and to become trusted business advisors in their organizations through mentoring, certification, education and adherence to high ethical standards.” We accomplish our mission through the events listed in this roster and on the Chapter website. We’re upping our game this year with even more opportunities to learn and network to include a history making, first ever, joint meeting with our sister Chapter in the UK.

The IMA sponsors the gold standard certification in management accounting, the Certified Management Accountant (CMA). Look in the roster and on the website for information on the assistance we offer to help you earn the CMA. If your company doesn’t pay for your CMA exam, we have a scholarship for that! When you earn your CMA, we reward you with \$100. Did you know that CMAs earn 61% higher median base salary and total compensation than non-CMAs? You can’t lose by getting your CMA!

Browse the roster and you’ll find information on the academic scholarships we grant, our social media presence and our Chapter calendar of events. Be sure to note our student activities sponsors, people and companies who have donated to our Chapter to further our work with local student groups and award academic scholarships. We encourage you to direct your business to these sponsors as a thank you for supporting our Chapter.

Are you on Facebook? Friend us! Are you on LinkedIn? Connect with us! Are you ever on the internet? Check out our website! Join us in engaging with all the accounting and finance professionals in the Tri-State area! I encourage you to join and get involved with a group of winners, the Joplin Tri-State Chapter of the IMA.

Best regards,
Jim Williams, CPA
President

Calendar of Events

[IIA Joint Educational Meeting](#)

Aug 30, 12:30 PM - 4:00 PM (CT)

Joplin, MO, United States

[IMA Educational Conference](#)

Sep 20 - 21, (CT)

Springfield, MO, United States

[H.E Williams Tour](#)

Sep 26, 5:30 PM - 7:00 PM (CT)

Carthage, MO, United States

[Jack Stack - The Great Game of Business](#)

Oct 23, 5:30 PM - 7:00 PM (CT)

Joplin, MO, United States

[November Seminar](#)

Nov 17, 1:00 PM - 5:00 PM (CT)

Joplin, MO, United States

[Bridging of the Continents - Joplin Tri-State & UK chapters](#)

Nov 28, 1:00 PM - 3:00 PM (CT)

Joplin, MO, United States

[Leah Wietholter on Fraud](#)

Jan 16, 5:30 PM - 7:00 PM (CT)

Joplin, MO, United States

[Lunch Meeting with Matt Flanigan](#)

Apr 17, 12:00 PM - 1:30 PM (CT)

Carthage, MO, United States

About your IMA Chapter

About Chapter

The Joplin Tri-State Chapter has been established for over fifty years, represented companies like Leggett & Platt, Lozier Corporation, Modine, and many others. The Joplin Tri-State Chapter is a group where like minded Accounting and Finance professionals can come together to learn new skills, earn CPE, and network with other professionals from a variety of local businesses and areas of expertise. We host several events throughout the year, including monthly meetings, meet and greet social gatherings, half-day seminars and much more. Along with all of the events we host, the Joplin Tri-State Chapter supports local accounting students by offering scholarships and free admission to chapter events, a big thank you to all our sponsors who help make our support of student members possible. If the Joplin Tri-State Chapter sounds like a group you would like to be a part of, check out our upcoming events and consider coming, the first meeting is on us for new members. If you are interested in becoming a member, IMA global is a great place to start.

What is the IMA?

IMA is the worldwide association of accountants and financial professionals working in business, committed to helping you -- and more than 80,000 members -- to expand your professional skills, better manage your organization, and enhance your career.

IMA and the Industry:

- Serving the profession since 1919
- There are an estimated 1.1 million accountants and financial professionals working in the U.S., of which nearly 75% work inside organizations.
- Employment of accountants is expected to grow by 16% between 2010 and 2020. (U.S. Bureau of Labor Statistics)
- IMA represents more than 80,000 members who work in public and private corporations, academia, and not-for-profit institutions.
- IMA has over 300 professional and student chapters worldwide.
- Today, there are more than 23,500 active CMAs (Certified Management Accountants).
- Globally, CMAs earn 59% more in median salary and 63% more in median total compensation than their non-CMA peers.

Chapter Mission & Vision

Our Mission

To provide Tri-State accountants and financial professionals opportunities to develop, network and advance in their careers; and to become trusted business advisors in their organizations through mentoring, certification, education and adherence to high ethical standards.

Our Vision

Global leadership in education, certification, and practice of accounting, finance, and information management.

Membership

The IMA professional network is unmatched in the Management Accounting and Financial Management profession. As a Member, you have nearly instant access to 85,000+ professionals worldwide via member directories, interest groups, conferences and local chapter meetings.

IMA Membership provides relevant Professional Development programs, earning you CPE credits, and keeping you up-to-date on current issues. The pinnacle of IMA professional development is the Certified Management Accountant (CMA) designation. This certification is the mark of a professional who has made a significant commitment to professional excellence and has demonstrated mastery of both strategic decision making and practical skill sets.

NOW, is the time for Management Accountants and Financial Managers to collaborate, learn and lead the profession through vast changes occurring in corporate governance, ethical decision-making, and lead organizational transparency and reporting issues. The profession has been and will continue to experience change and growth and now, more than ever it is critical to gain a broader professional perspective and skills to keep up with the new demands of management accounting and financial management.

We invite you to [join IMA](#) in the pursuit of professional excellence and leadership.

Benefits of Membership

Plan & Advance Your Career

CMA Certification

Earn the CMA® (Certified Management Accountant) and prove mastery of 11 critical practice areas in management accounting.

CareerDriver®

Assess your skills and create a personalized professional plan with our custom career management tool—Exclusive to IMA members.

Job Search

Employers can find talent, while job seekers can find accounting/finance positions in the U.S. and around the world.

Continuously Learn

CSCA Specialty Credential

CSCA® (Certified in Strategy and Competitive Analysis) is a credential for CMAs who want to deepen their strategic management expertise by building on their CMA certification.

500+ NASBA-approved courses

Satisfy your CPE requirements with a broad catalog of courses for every stage of your career—Discounted for IMA Members

IMA Webinars

Enhance your career and industry knowledge with exclusive members-only sessions, plus earn NASBA-approved CPE credits—Free for IMA members

Benefits of Membership

Build Networks

[IMA's Annual Conference & Exposition](#), Regional Conferences, [Student Leadership Conference](#)

Gain a dynamic networking and learning experience—Discounted for IMA members

[LinkUp IMA](#)

Connect with professionals worldwide through our proprietary online networking—Exclusive to IMA members. You can also network through our [Facebook](#), [Twitter](#), and [LinkedIn](#) channels

[IMA's 300+ Global Chapters and Councils](#)

Get involved with your local community - *Exclusive to IMA members*

Uphold Ethics

[Ethics Center](#)

Members and other professionals can access our confidential Ethics Helpline for guidance on ethical issues in business. Access resources, such as our Statement of Ethical Professional Practice and various learning resources, to promote integrity in business.

Benefits of Membership

Stay Current

IMA's Publications

Take the pulse of the profession with timely, actionable information.

Strategic Finance, our award-winning monthly publication

- Management Accounting Quarterly, a refereed online journal on critical topics affecting the profession

IMA Educational Case Journal, a quarterly, teaching-case journal for academics

E-newsletters, from general membership news in IMA Online News to specialty areas, including technology, careers, students, academics, and CMA certification

IMA Thought Leadership

Access the latest and rigorously researched data, best practices, and techniques

- Sponsored research studies, analyses of industry trends

Statements on Management Accounting (SMAs), authoritative reports on a wide range of topics within the profession

IMA Books

Stay ahead of the curve with practical information from IMA's series of published book titles.

McLeod Information Center

Locate essential research and resources in finance and accounting by contacting our Research & Information Manager.

Benefits of Membership

Save More

Special Offers

Enjoy deals from some of the world's leading brands—Exclusive to IMA Members

- Executive Recruitment
- Shipping
- Office Supplies
- Personal Insurance
- Automobile Insurance
- Technical Training
- Retail Discounts
- Rental Cars
- Credit Card Reward Programs
- Identity Theft Protection

Employee Recognition

The Joplin Tri-State Chapter of IMA is the only professional accounting group that has meetings and seminars in the local area. The CPA's meet in Springfield. I also like the broad range of industries that have members in IMA and the plant tours we have. There are only a few CPA firms in the area and a tour of a CPA office leaves a lot to be desired. Also the seminars put on by both the Tulsa chapter and the Heartland Council are outstanding. And there are also the friendly people who are active members of the Joplin Tri-State Chapter.

Clyde Eppard, CMA, CFM

Ethical Conduct

IMA STATEMENT OF ETHICAL PROFESSIONAL PRACTICE

Members of IMA shall behave ethically. A commitment to ethical professional practice includes: overarching principles that express our values, and standards that guide our conduct.

PRINCIPLES

IMA's overarching ethical principles include: Honesty, Fairness, Objectivity, and Responsibility. Members shall act in accordance with these principles and shall encourage others within their organizations to adhere to them.

STANDARDS

IMA members have a responsibility to comply with and uphold the standards of Competence, Confidentiality, Integrity, and Credibility. Failure to comply may result in disciplinary action.

Competence

1. Maintain an appropriate level of professional leadership and expertise by enhancing knowledge and skills.
2. Perform professional duties in accordance with relevant laws, regulations, and technical standards.
3. Provide decision support information and recommendations that are accurate, clear, concise, and timely. Recognize and help manage risk.

Confidentiality

1. Keep information confidential except when disclosure is authorized or legally required.
2. Inform all relevant parties regarding appropriate use of confidential information. Monitor subordinates' activities to ensure compliance.
3. Refrain from using confidential information for unethical or illegal advantage.

Ethical Conduct

Integrity

1. Mitigate actual conflicts of interest, regularly communicate with business associates to avoid apparent conflicts of interest. Advise all parties of any potential conflicts.
2. Refrain from engaging in any conduct that would prejudice carrying out duties ethically.
3. Abstain from engaging in or supporting any activity that might discredit the profession.
4. Contribute to a positive ethical culture and place integrity of the profession above personal interests.

Credibility

1. Communicate information fairly and objectively.
2. Provide all relevant information that could reasonably be expected to influence an intended user's understanding of the reports, analyses, or recommendations.
3. Report any delays or deficiencies in information, timeliness, processing, or internal controls in conformance with organization policy and/or applicable law.
4. Communicate professional limitations or other constraints that would preclude responsible judgment or successful performance of an activity.

Ethical Conduct

RESOLUTION OF ETHICAL CONFLICT

In applying the Standards of Ethical Professional Practice, the member may encounter unethical issues or behavior. In these situations, the member should not ignore them, but rather should actively seek resolution of the issue. In determining which steps to follow, the member should consider all risks involved and whether protections exist against retaliation. When faced with ethical issues, the member should follow the established policies of his or her organization, including use of an anonymous reporting system, if available. If the organization does not have established policies, the member should consider the following courses of action.

1. The resolution process could include a discussion with the member's immediate supervisor. If the supervisor appears to be involved, the issue could be presented to the next level of management.
2. IMA offers an anonymous helpline that the member may call to request how key elements of the IMA Statement of Ethical Professional Practice could be applied to the ethical issue.
3. The member should consider consulting his or her own attorney to learn of any legal obligations, rights, and risks concerning the issue.

If resolution efforts are not successful, the member may wish to consider disassociating from the organization.

Scholarships

College Scholarships

As a result of a very successful year during 1976 to 1977, the Joplin Tri-State Chapter established a scholarship fund at what is now Missouri Southern State University. The purpose of the fund is to help further the education of above average, but financially needy accounting students.

Currently the fund is designed to provide two scholarships at both Missouri Southern State University and Pittsburg State University. These scholarships are for \$500 to each university. Special qualifications needed to be considered as recipients are:

1. Accounting major
2. Minimum of 3.0 grade point average in accounting subjects completed
3. Must have completed at least 9 hours of accounting courses
4. Must be a member of the IMA

CMA Scholarships

The Joplin Tri-State IMA Chapter sponsors a CMA Exam Scholarship program. We award two \$350 scholarships annually to members to reimburse for CMA exam fees. You must be a member for 1 year to qualify. Details, rules and application are available on our website.

IMA Accounting Honor Society (IAHS)

The IMA Accounting Honor Society (IAHS) recognizes and honors academic achievement in the study of accounting and provides an opportunity for students to differentiate themselves as they begin their career journey.

Scholarship Recipients

College Scholarship Recipients

2006-2007	Christopher Runion	2012-2013	Jennifer Lee
	Stephanie Rice		Paula Stanley
	Carina Criger	2013-2014	Taylor McDaniel
	Lynzee Brown		Brent Phillips
2007-2008	Myra Percy	2014-2015	Shelley Pritchett
	Jeff Kemm		Sarah Pekarek
	Stephanie Hesser		Ashley Stephens
	Lynzee Brown		
2008-2009	Lauren Skimbo	2015-2016	Ethan Schwab
	Elyss Gutierrez		Jared Boman
2009-2010	Gavin McAlister	2016-2017	Kayla Bartlesmeyer
	Emily Alonzo		Kayla McCully
2010-2011	Gavin McAlister	2017-2018	Sabrena Beaman
	Joel Spencer		Christie Ogle
2011-2012	Amber Flood		Hailey Wilson

CMA Scholarship Recipients

2012-2013	Kristin Epperson	2016-2017	Zach Williams
	Jeff Moore		Tiffani Gilbert
2013-2014	Taylor McDaniel		Kayla McCully
	Matt Middleton		Gavin Houser
2015-2016	Heather York		Andrew Casey
	Dakota Going		Christopher Mott
	Renzhu Li		Melissa Elms

IMA Accounting Honor Society Recipients

2016-2017	Kayla McCully
	Tiffani Gilbert
	Shelby Smallwood

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RISE TO THE CHALLENGE.

“ Leggett & Platt, which pioneered sleep technology with its bedspring in 1883, conceives, designs, and produces a diverse array of products that can be found in most homes, offices, and vehicles. ”



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INCORPORATED

leggett.com

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Company Affiliation

4 State Trucks

Cessna Aircraft Co

Christ's Church of Oronogo

Church of Jesus Christ of Latter Day Saints

City of Joplin

Crowder College

Empire District Electric

HUTCHINSON SALT CO

Innovative Objects LLC

Jarden Consumer Solutions

KMT Waterjet Systems

Leggett & Platt, Inc.

Magnum Systems Inc.

Marco Group Inc.

Medicalodges Inc.

Mense, Churchwell & Mense PC

Mercy Health Systems, COE OK Foundations

Missouri Southern State University

Modine Manufacturing

NORTHEASTERN OK A&M COLL

Ozark Center

PILR Tech

Schreiber Foods Inc.

Tamko Roofing Products Inc.

The Insurancenter



CMA Members

Patricia Baker, CMA

Patricia Creech, CMA

Laurie Delano, CMA, CPA

David DeSonier, CMA

Clyde Eppard Jr., CMA, CFM, CPA

Dr. Jeffrey Garner, CMA, CPA

Wendy Guiou, CMA

Leslie Haase, CMA

Mark Hand, CMA

David Harris, CMA, CPA, CIA

Joseph Herndon, CMA

Reed Hoagland, CMA, CPA

David Jones, CMA, CPA

Sally Jones, CMA

Pamela Miller, CMA

Sandra Mills, CMA

Debra Moore, CMA

Nicholas Morfeld, CMA, CPA

Dr. David O'Bryan, CMA, CFM, CPA

Stephen Shelley, CMA, CPA

Alta Smith, CMA

Debra Weidert, CMA, CPA



Empire District™

A Liberty Utilities Company

CFM Members

Clyde Eppard Jr, CMA, CFM, CPA

Dr. David O'Bryan, CMA, CFM, CPA

What I like about the IMA and why I get involved are the opportunities for growth as an accountant and the chance to meet new people. The Joplin Tri-State Chapter does a great job of making the meetings interesting and fun, while still offering valuable, relevant information for today's workplace. With everything from tax updates and ethics to excel tip and tricks, there is always something to take away from a meeting. If you want to excel as an accountant and make great contacts, I see no better way than to join the IMA.

Dakota Going



25+ Year Members

Laurie Delano

Patricia Pyle

Reed Hoagland

Judson Fisher

Sandra Mills

Jeffrey Garner

Tammy Trent

Stephen Shelley

David Jones

Penny Collins

Alta Smith

David O'Bryan

Patricia Baker

Edward McNally

Harvey Erwin

Debra Brill

Theresa Ukena

Stephen Williams

Clyde Eppard

I joined the IMA and became a board member for the opportunities...opportunities to meet new people, learn about my profession and to help provide opportunities to students. The Joplin Tri-State IMA is always striving to meet the needs of its members, and because it met my needs, I decided to get involved. Please check out our website, Facebook and LinkedIn pages to find out what the Joplin Tri-State IMA can do for you!

Becky Burns

Young Professionals

Katherine Baldwin

Holly Bloomer

Jared Boyd

Eric Brooks

Robert Brown

Amber Burkybile

Courtney Clouse

Ashley Grafton

Cheyenne Hatfield

Caley Hedman

Ashley Hiatt

Jessica Jensen

Ashley Sturgis

Brandon Surratt

Michelle Testerman

Zachary Williams

Heather York

Like many of you I have been a member of the Joplin Tri-State IMA Chapter for a number of years and attended as many activities as possible. The meetings have always been interesting and educational. I have enjoyed meeting and getting to know other finance and accounting professionals in our community. It is a great benefit we offer to the local financial community to have an outstanding IMA chapter that can offer so much. Often you only find IMA chapters as active as Joplin Tri-State in much larger cities. It can also help to improve your leadership skills especially if you volunteer for a Board position. My only regret is that I didn't find a way to squeeze in some time earlier in my career to get more involved.

Gene Michael

Student Members

Greg Archer
Kayla Bartelsmeyer
Abbie Campbell
Andrew Casey
Tiffani Gilbert
Patty Holder
Gavin Houser

Renzhu Li
Nathaniel Loewen
Amy Martin
Kayla McCully
Taylor McDaniel
Christopher Mott
Karen Olsen

Sarah O'Neal
Shelby Smallwood
Sandra Tani
Crystal Thompson
Nao Vang
QINGHAO XIA



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Together, we'll create a blueprint to guide your financial life.

Create your financial plan with Northwestern Mutual. From disability insurance to life insurance and financial planning, together we'll design a personalized plan to help you achieve financial security. Who's helping you build your financial future?



Tylor Willis
Financial Advisor
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tylorwillis.com



Northwestern Mutual

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Your Chapter Board

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VP of Administration: OPEN! THIS COULD BE YOU!

VP of Education: Cheyenne Hatfield - cheyenne.hatfield@leggett.com

Director of CMA: OPEN! THIS COULD BE YOU!

Director of Meetings: Connie Fortner - connie.fortner@jasperproducts.com

Director of Social Media: Dakota Going - dakotagoing@gmail.com

Director of Meeting Attendance: Sally Jones - Sally.Jones@eaglepicher.com

Director of MSSU Activities: Dr. William Huffman, CPA - Huffman-W@mssu.edu

Director of PSU Activities: OPEN! THIS COULD BE YOU!

Webmaster— Dakota Going - dakotagoing@gmail.com

Director of Program Roster: Heather York - heather.york@leggett.com

Director of Newsletter: Jessica Jensen - jessica.jensen@legget.com

Director of Young Professionals: Robert Brown - robert.brown@leggett.com

Director of High School Activities: David Smith - david.smith2@leggett.com

MSSU Accounting Club Board Liaison: Charynn Multhaup—charynn.multhaup@leggett.com

PSU Student Chapter Board Liaison: OPEN! THIS COULD BE YOU!

**If you're interested in joining the board please email*

Jim Williams at jim.williams@leggett.com

Past Presidents

1963-1965	Thomas Drummy	1992-1993	Dale Harrington
1965-1966	Edward McNally	1993-1994	Alta Smith
1967-1968	Mark Whitaker	1994-1995	Clyde Eppard
1968-1969	D. Gordon Laughlin	1995-1996	Patty Pyle
1969-1970	Harvey Erwin	1996-1997	Cheryl Stephenson
1970-1971	Jerry Dodson	1997-1998	Wendy Widder
1971-1972	Byron Mueller	1998-1999	A. Jay Logal
1972-1973	Homer Smith	1999-2000	Robin Brown
1973-1974	Ralph Costley	2000-2001	Janet Watson
1975-1976	Stephen Howard	2001-2002	Clyde Eppard
1976-1977	Gary Hunter	2002-2003	Jim Williams
1977-1978	D. Leroy Cockrell	2003-2004	J. Russell Hardin
1978-1979	Lovern Ellis	2004-2005	Tiffany Cossey
1979-1980	Gary Brown	2005-2006	Joni Shively
1980-1981	Steve Tarrant	2006-2007	William Huffman
1981-1982	George Barnes	2007-2008	Tiffany Cossey
1982-1983	Dwayne Jeffries	2008-2010	Rich Vaughan
1984-1985	Garry Tallman	2010-2013	Sherrie Waterman
1985-1986	Daniel Stengel	2013-2015	Gene Michael
1986-1987	Laurie Delano	2015-2017	Jim Williams
1987-1988	Martin Williams		
1988-1989	David Jones		
1989-1990	Chris Churchwell		
1990-1991	Joyce Carpenter		
1991-1992	Steve Williams		

Thanks to our Sponsors

Thanks to the generosity of all the sponsors for this year's Program Roster, the Joplin Tri-State Chapter's involvement in our student members will increase tremendously. This year, IMA Student Members will attend meetings for free and non-IMA student members will continue to receive a discounted rate for meetings. We are also increasing our interaction with area colleges, awarding more scholarships and helping to mitigate the competency crisis. Again, thank you!

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