

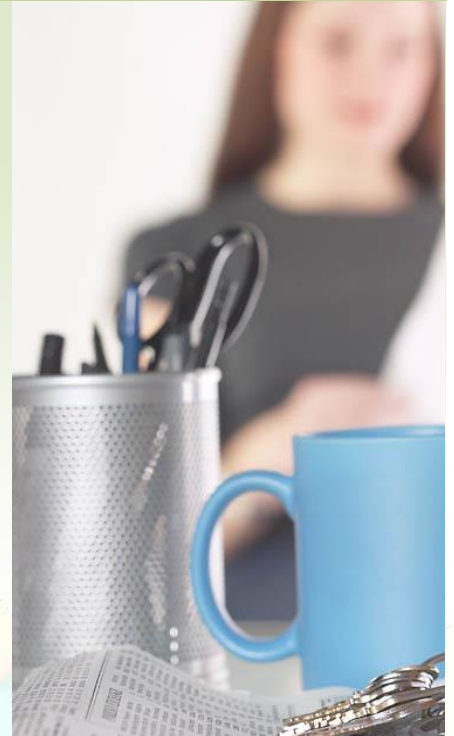


The Association of Accountants and Financial Professionals in Business

The General Ledger

Summer 2023

MINNEAPOLIS CHAPTER



~ Stay Cool with the IMA Minneapolis Chapter ~



The Association of Accountants and Financial Professionals in Business

CELEBRATING OUR MEMBERS

Honoring IMA Members Celebrating 25 Years with our Minneapolis Chapter!

Amy Sluis

Chad Smoley, CMA

Honoring IMA Members Celebrating 5 Years with our Minneapolis Chapter!

Silvester Njuguna, CMA

Jodi Olson, CMA

Mary Joseph, CMA, CPA

Kathleen Robb, CMA

Sara Cox, CMA, CPA

Tracy Maurer

Leigh Fleahman

Ryan Richardson, CMA

David Lundeen

Rachel Foster

Cody Schniepp, CMA

Lauren Schmidtke, CMA

Alex Kubitz, CMA

Thomas Polta

Olga Shlapunova, CMA

Melissa Howry, CMA

Daniel Hebert, CMA

Rebecca Dahlquist

Yolanda Schultz, CMA

Ana Beatriz Machado Bohlken, CMA

NEW CHAPTER MEMBERS

Please welcome our newest chapter members

Alex Danzberger, Jr.

Michael Barton

William Quinn

Jennifer Ampe

Beth Huettl

Julie Schumacher

Bailey Goldman

Suzanna Hoover

Kaled Souaydan

Doug Roderick

Chelsea Larson

Jessica Blomberg

Todd Trettel

Jenn Kirk

Sarah Knudson

Andrea Jore

Justin Hogan

Adam Stone

Pamela Williams

Kevin Besikof

Wendy Stark

Grand Schumacher

Gustavo Gomez

Jeffrey Bartels

Kristine Haffely

Ashley Peterson

Event Recap

IMA Minneapolis Chapter 100th Anniversary Boat Cruise



In recognition of the Chapter's 100th anniversary, the IMA Minneapolis Chapter hosted a boat cruise on the eve of the IMA23 conference in Minneapolis. Distinguished guests from IMA Global, SCMS Members, as well as local chapter members participated in a great time on the water.

The group enjoyed a three-hour cruise downtown winding through the Mississippi River and past the St. Anthony Falls locks. In addition to the nice summer evening, going through a lock was a story in itself. Per the captain, over six million gallons of water flood the lock after the boat is anchored to the side in order for the boat to rise/rescind to the river's corresponding level.



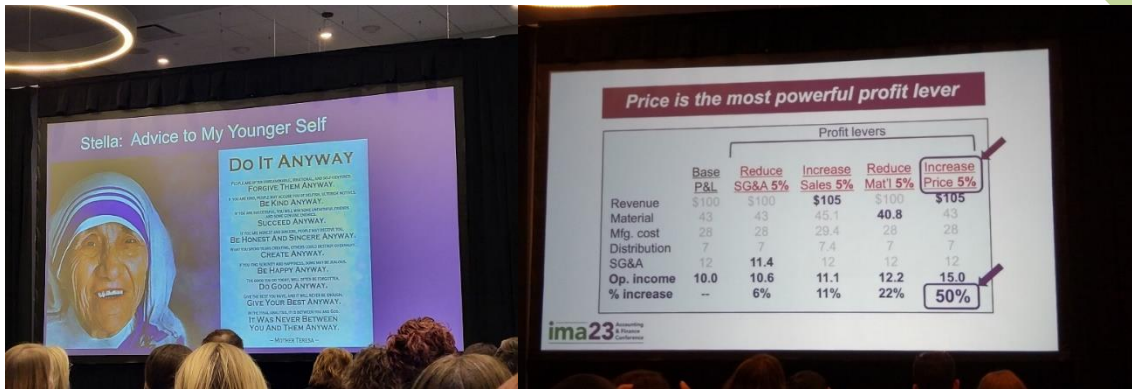
On the opposite side of the lock flooding up to the river's level, there was the iconic Stone Arch Bridge along with a nice view of downtown Minneapolis. It was wonderful to be able to open this event to not only Minneapolis Chapter members, but also to additional IMA peers from outside of town. The IMA's new President and CEO, Mike DePrisco, as well as the previous President, Jeff Thompson, were even able to attend on the warm Minnesota evening.



IMA23 in Minneapolis June 2023

In June 2023, the IMA's biggest event of the year was hosted in Minneapolis. This occurred over the course of a Sunday through Wednesday and offered attendees to choose from dozens of continuing education presentations throughout the experience. This event was hosted at the Hyatt Regency on Nicollet Mall with each day starting with a keynote address and often finishing with a roundtable in the grand ballroom.





Throughout the course of the day, conference attendees had the opportunity to choose from one of four concurrent presentations for each allotted CPE session. For example, you could choose from a general topic like Presentation Skills to more Accounting/Finance-specific topic like Price Analytics Tools. Each of these disciplines relevant to the profession have their own merits and worth.



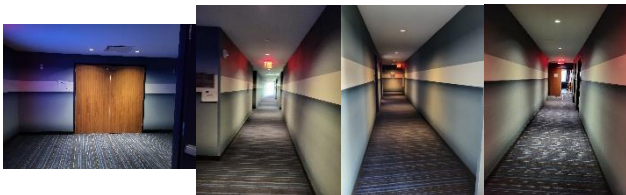
Roundtable panels were the standard ending to the conference days. These included a combination of local and national experts sharing their insights into what is relevant to the future of the Accounting and Finance profession. Jeff Thompson was a special [unannounced] panelist. He dedicated the last 15 years to leading the IMA organization.



A special shout-out to local Professor, Boz Bostrom, who presented Business Ethics at the conference on the Hyatt’s Nicollet Ballroom grand stage. Boz is an author and a professional public speaker as well as a teacher at the College of Saint Benedict and Saint John’s University. Boz was gracious enough to present to the Minneapolis IMA Chapter in-person this January in what ended up being a top three winter snowfalls for local residents. He presented what might otherwise be considered a dry topic (ethics) to rave reviews in an engaging and informative performance.

IMA23 Hospitality Suite

To round out each evening experience at IMA23, the IMA Minneapolis Chapter hosted a hospitality suite for members and other IMA member guests. While networking among fellow colleagues, attendees had appetizers, snacks, and perhaps one of the most uniquely Accounting/Finance drink menus in existence. An A+ for creativity goes to our Past President Lianne Loeks Munson and her Bar Rescue aficionado husband, Craig.



It was a bit of a maze to get to, but once guests arrived they had a ton of fun!





Plenty of guests were able to join for some great conversations and memories. Despite the first two nights cycling colleagues through the door past midnight, the group did not receive a single noise complaint. As an added bonus, an influx of conference attendees joined after the Twins beat the Brewers 7-5 following a four-run bottom of the ninth victory including a walk-off homerun by Correa. Chapter members were able to share their personal Minnesota stories as well as some of the awards the chapter and it's members have earned over the years.

The surrounding chapters including Fargo-Moorhead and Duluth-Superior also made the Chapter suite possible. The Minneapolis, Fargo-Moorhead, and Duluth-Superior Chapter's are really grateful for those who joined over the course of the three evenings. Hosting members from across the globe was a fun way to round out each night. Morning seemingly crept up awfully quickly.



IMA Minneapolis Chapter Global Award Recipients 2023

This year, the IMA Minneapolis Chapter was fortunate to have two Chapter board members be presented with awards which are given to highly-deserving IMA members. They both join great company along with the Chapter Past President Lianne Loeks Munson in attaining such status. Every year, there are fewer than five or fewer dedicated IMA leaders to achieve these awards.

Shari Nepper, CMA, MBA has been awarded the IMA Champion Award. She has served for nearly two decades in IMA leadership roles. These spanned from the St. Paul Chapter, Northern Lights Council, and Minneapolis Chapter. Shari has and continues to be significantly involved within the IMA and is currently the Chapter Treasurer.

Ashley Davis, CMA, CSCA, FPAC has been awarded the IMA Exemplary Young Professional Award. She joined the IMA in 2019 and the IMA Minneapolis Chapter board shortly after earning her CMA. Beyond leadership within the Minneapolis Chapter, Ashley has co-led global teams within the broader organization. She is currently the Chapter's VP of Communication.

Congratulations Shari & Ashley!



Global Award Winners

IMA EXEMPLARY GLOBAL BOARD MEMBER AWARD
Charles R. Wright, CMA, CGMA, CPA
Denver – Centennial Chapter

IMA R. LEE BRUMMET EXEMPLARY EDUCATOR AWARD
Dr. Madhavi Lokahnde, CMA, FCMA
Bangalore Chapter
Dr. Sandra B Richtermeier, CMA, CPA
Boston Chapter

IMA EXEMPLARY YOUNG PROFESSIONAL AWARD
Arriane Steffi Garrote Bacon, CMA
Philippines Chapter
Ashley Davis, CMA, CSCA
Minneapolis Chapter
Tala Khalifeh, CMA
Beirut Chapter

Global Award Winners

IMA CHAMPION AWARD
Emmylou Duell
Finger Lakes Chapter
Dr. Rinku Bhattacharya, CMA, CPA
Westchester Gateway Chapter
Bernice Jenkins, CMA, CPA
Birmingham Chapter
Shreyanse Jain, CMA, CA
Bangalore Chapter
Shari L Nepper, CMA
Minneapolis Chapter




The IMA Minneapolis Chapter President, Trent Kramer recently had an article published in Strategic Finance titled: [Finding My Niche](#). Be sure to check it out!



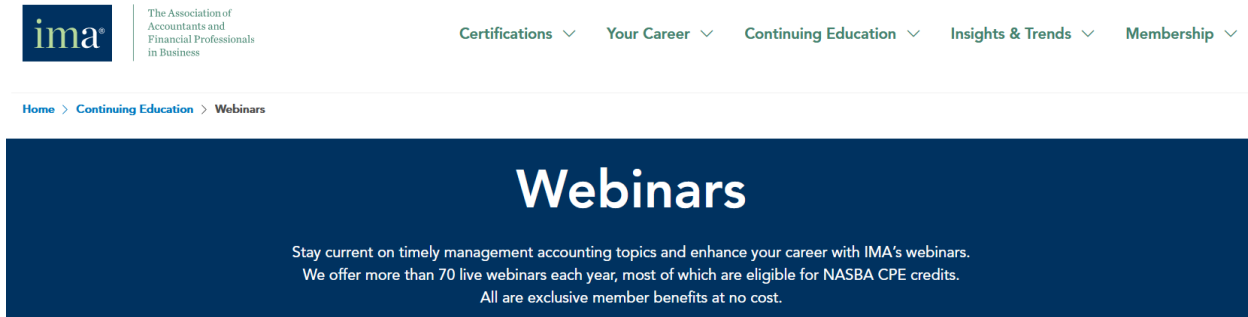
A promotional banner for the IMA 24 Accounting & Finance Conference. The banner features a blue and green gradient background. In the top left corner, a blue circular badge contains the text "June 9-12 See you next year!". The main text reads "ima24 Accounting & Finance Conference" in white and green, with "JW Marriott San Antonio Hill Country Resort & Spa" listed below it.

Visit minneapolis.imanet.org to view upcoming Minneapolis Chapter events.

Resources

Free Webinars

Be sure to check out these complimentary weekly webinars available for IMA Members:































Should you have additional time over a lunch hour or comparable timeframe, the following website comes highly recommended by Chapter President, Trent Kramer:



This site aggregates free CPE webinars hosted by some of the most notable Public Accounting & Consulting firms out there.

Both of these webinar links provide continuing education which qualify for NASBA CPE. Even if you have no requirement at all, attending these free events will further develop your Accounting and Finance understanding. Starting a professional career within this discipline is just the beginning of a far greater accomplishment.

Event Organizers

 ADP 9 upcoming events	 Baker Tilly 1 upcoming event	 BDO 11 upcoming events	 Cherry Bekaert 8 upcoming events
 CLA 8 upcoming events	 CohnReznick 3 upcoming events	 Crowe 7 upcoming events	 Deloitte 4 upcoming events
 Eide Bailly 8 upcoming events	 EY 4 upcoming events	 Forvis 13 upcoming events	 Grant Thornton 2 upcoming events
 Illumeo 1 upcoming event	 IRS 1 upcoming event	 KBKG 31 upcoming events	 KPMG 7 upcoming events
 LeaseQuery 1 upcoming event	 Marcum 2 upcoming events	 MHM 2 upcoming events	 Moss Adams 6 upcoming events
 Plante Moran 1 upcoming event	 Protiviti 1 upcoming event	 PWC 4 upcoming events	 Riveron No upcoming events
 RSM 4 upcoming events	 Schellman No upcoming events	 Summit No upcoming events	 UHY No upcoming events

Enhance Your Strategy Expertise with the CSCA®

Build Your Strategic Mindset

For a limited time, take advantage of our special offer when you register for the September CSCA exam! Pay just \$499 for a bundle that includes program entry, exam registration and 2 years of access to our learning tools.

> Register

SAVE UP TO \$375
on the September
CSCA program

CSCA®

Organizations need leaders who can solve complex problems and drive the strategic planning process. Those are the skills you will gain when you earn your CSCA® (Certified in Strategy and Competitive Analysis credential). This IMA advanced certification is now open to holders of many top-tier accounting and finance credentials.

For a limited time, you are invited to take advantage of this special offer: Save up to \$375 when you [sign up for the September 2023 exam!](#) Your final cost of \$499 gives you entry into the CSCA program, registration for the September exam, and two years of access to the IMA Strategy and Competitive Analysis Learning Series®. [Register today.](#)

IMA Count Me In Podcast

The IMA's Count Me In Podcast has celebrated over 225 episodes. These are generally 15-20 minute digestible bites focused on topics related to the Accounting and Finance world. Check it out.



Free Self-Study CPE

It pays to be a member! Utilize this member benefit by logging into your profile on imanet.org and viewing the Course Catalog in the Education Center drop-down.

[Coaching for the 21st Century](#) (1.0 CPE)

[Communicating in the 21st Century](#) (1.0 CPE)

[COSO Enterprise Risk Management: Essential to Organizational Success](#) (2.0 CPE)

[Count Me In for CPE](#) (0.2 CPE each)

[Cybersecurity Alert!](#) (0.5 CPE)

[Driving Strategic Management with the Profitability Analytics Framework](#) (2.5 CPE)

[Embracing Change](#) (1.0 CPE)

[Emotional Intelligence](#) (1.0 CPE)

[From Accountant to Business Partner](#) (1.5 CPE)

[Enhancing the Employee Experience](#) (1.0 CPE)

[IMA Excel 365: Tips in Ten](#) (0.2 CPE each)

[Leadership Foundations for Management Accountants](#) (1.0 CPE)

[Listening Skills](#) (1.0 CPE)

[Making Your Next Career Move with Intention](#) (1.8 CPE)

[Predicting the Future: Anything Can be Modeled](#) (1.5 CPE)

[Presentation Skills](#) (1.5 CPE)

[Psychology of Leadership Decision Making](#) (1 CPE)

[Revenue Management: Methods to Drive the Top Line](#) (1.2 CPE)

[Statement of Cash Flows Tutorial](#) (1.0 CPE)

[Storytelling Skills for Management Accountants](#) (1.0 CPE)

[Strategic Analysis for Management Accountants and CFOs](#) (2 CPE)

[Successfully Managing Workplace Conflict](#) (1.5 CPE)

[Teaming to Achieve](#) (1 CPE)

[Time Management](#) (1.0 CPE)

[U.S. GAAP vs IFRS: Nonfinancial Assets](#) (1.0 CPE)

[U.S. GAAP vs. IFRS - Liabilities and Related Special Topics](#) (1.0 CPE)

[Workplace Motivation](#) (1.0 CPE)

Strategic Finance is now Digital!

Check out the latest issue of Strategic Finance, the IMA's monthly publication on all things Finance and Accounting, here: [Strategic Finance – The Case for Strong First-Line Risk Governance](#)



Free Self-Study Ethics CPE

Don't forget to take your two hours of Ethics CPE! All CMAs are required to take at least two hours of Ethics CPE each year. The IMA offers their ethics courses as a complementary benefit for being a member. Sign in to claim your free offer.

[Ethics in the Digital Age](#) (2.0 CPE)

[Ethics: The Power of Trust](#) (2 CPE)

[IMA Ethics Series: Action Required-Navigating Ethical Dilemmas](#) (2.0 CPE)

[IMA Ethics Series: Blinded by Pressure](#) (2.0 CPE)

[IMA Ethics Series: Can We Count on You?](#) (2.0 CPE)

[IMA Ethics Series: House Out of Control](#) (2.0 CPE)

[IMA Ethics Series: Misplaced Trust |Devastating Fraud](#) (2.0 CPE)

[IMA Ethics Series: Mission Impossible: When Benchmarks Undermine Ethics](#) (2.0 CPE)

[IMA Ethics Series: The Slippery Slope of Greed](#) (2.0 CPE)

[IMA Ethics Series: Web of Deception](#) (2.0 CPE)

As an added benefit for CPA holders, majority of these courses also qualify for NASBA CPE.

In his book, *The 17 Essential Qualities of a Team Player*, John C. Maxwell shares a little analogy in his fifth chapter on Competence:

DAILY TAKE-AWAY

A sea captain and a crusty chief engineer were talking one day, and they began to argue about whose expertise was most needed for the running of the ship. The debate got more and more heated, and finally the captain decided that they should trade jobs for a day. The chief engineer would be on the bridge, and the captain would go down to the engine room.

Only a few hours into their shift, the captain emerged from belowdecks sweating, his face and uniform covered with dirt and oil.

"Chief," he bellowed, "you need to get down to the engine room. I can't get her to go."

"Of course you can't," barked the chief. "She's aground!"



Leadership Academy

Take the Lead in Your Career

The IMA Leadership Academy (IMALA) supports the development and enhancement of our members' leadership education and skills to aid in career advancement.

All benefits are available at no extra cost to IMA members.

[Leadership Academy | IMA](#)



Career Resources

Assess your strengths and weaknesses against 33 management accounting competencies with **CareerDriver®**.

You can map out your career path toward one of 46 management accounting roles.

[Visit Our CareerDriver® Page](#)



IMA's Certification for
Accountants and
Financial Professionals
in Business



Certified in Strategy
and Competitive
Analysis

Student Support



Did you know more than 2,000 colleges and universities from around the world have participated in the CMA Scholarship program? Over \$35 million of scholarships have been provided by IMA to help students pursue the CMA certification at no cost to them.

Be one of the 10 students from your school this academic year to be nominated by professors to receive the CMA Scholarship!

[What is the CMA Scholarship?](#)

[Other Student Scholarships](#)

25% Off Your IMA Membership with Auto-Renewal

Interested in saving 25% on your annual membership fees? The IMA has just initiated an auto-renewal program that offers this discount. As part of our commitment to providing IMA members with superior value, we are pleased to announce the launch of our automatic renewal discount program. Just follow the steps below to enroll and save 25% every year:

1. Log into your account on the [IMA website](#), and go to the IMA Dashboard
2. On the dashboard navigation, click myProfile, then My Membership
3. Under Current Membership, click on the checkbox to opt into automatic renewal*
4. Once a popup is displayed, you will be prompted to either save or cancel your action
5. Add a credit card to your file to be used for the automatic renewal of your IMA membership

If you currently have a renewal invoice, you can enroll in IMA's automatic renewal program by clicking on the opt-in checkbox upon checkout. Please note that the annual discount will begin on your next renewal period. To learn more about IMA's automatic renewal program, please check out the [FAQs](#).



Looking for a new role?

[Explore IMA's Job Opportunities](#)

Chapter Board of Officers 2023-2024



Pictured (left to right): Willy Arevalo, Bhavesh Parekh, Rudy Hershberger, Dave Franz, Trent Kramer, Lianne Loeks Munson, Andrew Galas, Ashley Davis, Heath Hertel, Sheri Nepper, & James Powers
Forefront: Gwen Van Berne (IMA Chair 2022-2023) & Steve McNally (IMA Chair 2021-2022)
Not pictured: Warda James-Hester & Todd Stenson

Position

President
Past President
VP of Engagement
VP of Communications
VP of Professional Education
Treasurer
Director of Education
Director of CMA & Student Engagement
Secretary
Chapter Delegate
Chapter Delegate

Name

Trent Kramer, CMA, CPA, CSCA
Lianne Loeks Munson, CMA, CSCA
Bhavesh Parekh, CMA, PMP, ACMA
Ashley Davis, CMA, CSCA, FPAC
James Powers, CMA
Shari Nepper, CMA, MBA
Andrew Galas, MBA
David Franz, CMA
Willy Arevalo, CMA
Warda James-Hester, CMA, CPA
Todd Stenson

**A huge thank you to our board members rolling off this year:
Heath Hertel, CMA, CPA and Rudy Hershberger!**

**If you are interested in learning more about serving on the board reach out to
board@minneapolisima.org**