



# MID-AMERICA COUNCIL

THE ASSOCIATION OF ACCOUNTANTS AND FINANCIAL PROFESSIONALS IN BUSINESS



## NEWSLETTER

### PRESIDENT'S MESSAGE

Greetings to all IMA members, leaders, and volunteers in the Mid-America Council region. Summer is quickly passing by. I hope that all of you have enjoyed the warm weather and gotten to spend some time outdoors.

The Council and the Council's Chapter Boards are in the planning stage for the upcoming Chapter year. The Council is planning an education conference and Leadership Training Session (LTS) for April 2017. If you missed this year's LTS, you missed out on informative education sessions and networking with other IMA members. Plan now to attend LTS in April 2017 so you don't miss out again.

The new Mid-America Council Board has been formed and is diligently working to complete the budget, review Chapter grant applications, and plan for the education seminars next April. Our next Council meeting will be July 30th. Please see the agenda included in the newsletter or the website for the meeting details. All IMA members are welcome to attend and participate at the Mid-America Council meetings.

Please remember that the Mid-America Council is here to help the Chapters in our region. Each Chapter has a Regional Director that should have reached out to the Chapter Board President and stays in communication with them throughout the Chapter year. If you do not know who your Regional Director is, please contact anyone on the Mid-America Council Board and we can direct you to the appropriate person. Regional Directors have had past Board experience and can help with any issues that arise at the Chapter level. Don't hesitate to ask for help. That is what we are here for. You would be surprised at how many of the Chapters have the same issues and we can all learn from one another.

Enjoy the rest of your summer. We hope to see you at the next Mid-America Council meeting and at future events.

Michele Reagan  
Past President of Mid-America Council



With summer comes the new IMA year

### JULY 2016

#### In this issue:

Message from the President	1
MAC 2016-2017 Slate of Officers	2
MAC July Meeting—Agenda	3
MAC July Meeting—Other Info	4
MAC April Meeting Minutes	5-7

### JOIN US

#### Special points of interest:

##### Next Council Meeting:

When: Saturday, July 30, 2016  
9:00am – 12:00pm

Where: The Beloit Club  
2327 S Riverside Dr.  
Beloit WI 53511



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## MID-AMERICA COUNCIL 2016-2017 BOARD MEMBERS

### BOARD POSITION

President

### NAME, CHAPTER

Rotation of:

Harlan Fuller, Central Illinois

Michele Reagan, Rockford

Bruce Hamilton, Madison

John Wieland, Winnebago

Rick Bellmore, Winnebago

Martha Paalman, Winnebago

Stephen Craig, Chicago

Eric Griffin, Madison

Dana Riess, Chicago

Kas Henry, NW Suburban Chicago

Kathy Horton, Fox River Valley

Dave Skora, Madison

Joel VanDerWeele, Chicago

Michele Reagan, Rockford

Pam Voorhees, Fox River Valley

Joel VanDerWeele, Chicago

OPEN

John Wieland, Winnebago

Bruce Hamilton, Madison

Connie Lusietto, Central Illinois

Pam Voorhees, Fox River Valley

John Wieland, Winnebago

Connie Lusietto, Central Illinois

Bruce Hamilton, Madison

Harlan Fuller, Central Illinois

Mary Strautmann, Greater Milwaukee

Bruce Hamilton, Madison

Harlan Fuller, Central Illinois

Mary Strautmann, Greater Milwaukee

Dave Skora, Madison

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President Elect

Secretary

Treasurer

VP - Communications

Director - Newsletter

VP - Education

Director - Student Relations

Regional VP

Regional Director - Calumet

Regional Director - Central Illinois

Regional Director - Chicago

Regional Director - Fox River Valley

Regional Director - Greater Milwaukee

Regional Director - Heart of WI

Regional Director - Illowa

Regional Director - Madison

Regional Director - NW Suburban Chicago

Regional Director - Packerland

Regional Director - Rockford

Regional Director - Winnebago

MAC Long-Range Planning Committee

Council Bylaws Committee

Nominating Committee

Committee on Academic Relations (IMA Global)

CLEW Development Committee (IMA Global)

Volunteer Leadership Committee (IMA Global)



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## CONTACT US

We're on the Web!

<http://midamerica.imanet.org>

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UPCOMING MEETING INFORMATION

**IMA MID-AMERICA COUNCIL  
MEETING AGENDA**

Date & Time	Teleconference Information	Location
Saturday, July 30, 2016 9:00am – 12:00pm	Dial-in number: 712-432-1500 Access Code: 514007#	The Beloit Club 2327 S Riverside Dr. Beloit WI 53511 ( <a href="#">map</a> )

1. 9:00am – 9:05am	Welcome & Introductions	Michele	5 minutes
2. 9:05am – 9:15am	President’s Report Chapter Grants	Michele & John	10 minutes
3. 9:15am – 9:20am	Secretary’s Report Approve Minutes from 4/22/16 Mtg	Martha	5 minutes
4. 9:20am – 9:40am	Treasurer’s Report Financial Bills	Steven	20 minutes
5. 9:40am – 9:55am	President-Elect’s Report 2017 LTS Council Award of Excellence	Rick	15 minutes
6. 9:55am – 10:15am	Regional VP & Regional Directors IMA Board Update Regional Chapter Reports	Dave	20 minutes
7. 10:15am - 10:25am	BREAK		10 minutes
8. 10:25am -10:35am	VP-Communications Newsletter Due Date Council Website Event Schedule	Eric & Dana	10 minutes
9. 10:35am–11:05am	VP-Education Student Conference / Student Grants Student Chapter Outreach 2017 Education Conference	Kas & Bruce	30 minutes
10. 11:05am–11:10am	Bylaws Committee Report	Mary	5 minutes
11. 11:10am–11:15am	Committee Reports Long Range Planning Committee on Academic Relations Volunteer Leadership Committee	Harlan/ Dave	5 minutes
12. 11:15am–11:20am	Old Business		5 minutes
13. 11:20am–11:35am	New Business		15 minutes
14. 11:35am–11:40pm	Past Presidents		5 minutes
15. 11:40am	Meeting Adjournment		



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UPCOMING MEETING INFORMATION

## IMA MID-AMERICA COUNCIL JULY MEETING DRIVING / OTHER INFO

The July Board meeting will be held at The Beloit Club, 2327 S Riverside Dr., Beloit WI 53511. Those wishing to stay for lunch can order off the club's luncheon menu and we'll eat in the same room as our meeting.

The Club needs a headcount for our continental breakfast, number of chairs needed, etc. so please let us know if you're going to attend no later than Friday July 22! Board members, even if you can't make it, or plan to call in, please RSVP to let us know that as well.

[Click here to RSVP!](#)

### **DIRECTIONS from MILWAUKEE**

Take I-43 from Milwaukee and follow it until it ends at I-90 on the outskirts of Beloit. The road becomes WI Hwy 81. Follow Hwy 81 into downtown Beloit, approximately 4 ½ miles, to US Hwy 51 (also Riverside Drive). Turn right (North) on Riverside Dr. and follow for approximately 2 miles. There is construction (extremely popular in the Janesville/Beloit area this summer!), so pay attention. The Beloit Club is located on your right off Riverside Drive just before the construction ends.

**NOTE:** Don't be tempted to use Google Maps directions and see that taking Cranston Road is shorter. Cranston is closed at Riverside due to construction!

### **DIRECTIONS from ROCKFORD, CHICAGO & POINTS SOUTH**

Take I-90 north towards Madison and get off at Exit 185, Hwy 81. Then follow the Directions from Milwaukee, above.

### **DIRECTIONS from MADISON & POINTS NORTH**

Take I-90 south through Janesville, and get off at Exit 177, WI Hwy 11 West. Mind the construction! Follow Hwy 11 west approximately 2 ½ miles to US Hwy 51. There is a big Kwik-Trip store on your left. Turn left (South) on US Hwy 51 (Riverside Dr.) and follow it past KJVL for 7.3 miles. More construction on a section of the route so be careful! The Beloit Club is on your left just after the next construction area starts.

### **PARKING**

Drive up the hill to the Clubhouse. Parking is available in the front and also in the rear of the building. We will be meeting on the main level, and there is an elevator towards the opposite end of the hallway if you come into the building from the rear.

Bruce Hamilton will have his cell phone with him (608.290.6570) in case you need to reach someone.

These directions are valid as of July 12 and may have to change as the area-wide construction projects progress. Bruce will run both routes again on July 29 and let everyone know if there are changes in the routes.



IMA Mid-America Council Board Meeting  
Northern Illinois University, Rockford, IL  
April 22, 2016

ATTENDANCE

NAME	CHAPTER	MAC POSITION
John Wieland	Winnebagoland	Past President
Angela Truong	Fox River Valley	Secretary/Director-Newsletter
Sheryl Elliott	Fox River Valley	Regional Director/Past President
Pam Voorhees	Fox River Valley	Chapter Delegate
John Fratamico, Jr.	Northwest Suburban	Chapter Member
Bill Ramsay	Winnebagoland	Past President
Bruce Hamilton	Madison	VP Education/Past President
David Skora	Madison	Global Director/Past President
Todd Hilliard	Rockford	Chapter Delegate
Martha Paalman	Winnebagoland	Chapter Delegate
Eric Griffin	Madison	VP Communications
Michele Reagan	Rockford	Regional Director
Harlan Fuller	Central Illinois	Past President
Rick Bellmore	Winnebagoland	Treasurer

Harlan Fuller called the meeting to order at 4:05pm. The meeting began with introductions of the members that were present.

**NOMINATING COMMITTEE** – Sheryl Elliott, Chair

The slate of officers was mostly finalized by the Nominating Committee and will be included in the newsletter. Addition to the slate that was decided in today’s meeting is Michele Reagan for Regional Director-Central Illinois. Regional Director-Greater Milwaukee is an open position that will need to be filled.

Motion to approve the slate of officers for 2016-2017 IMA year was made by Bruce Hamilton and seconded by Bill Ramsay. Motion passed.

**PRESIDENT** – Harlan Fuller (Interim)

No report.

**PRESIDENT-ELECT** – Open

Sheryl Elliott is working on the Council Award of Excellence application that is due on April 30<sup>th</sup>. She will send it to the Mid-America Council officers before the submission for review/comments.

Sheryl Elliott will be the SCMS President for the 2016-2017 IMA year. If anyone is interested in joining SCMS, they should contact a current SCMS member.



**SECRETARY – Angela Truong**

The minutes from the January 30, 2016 Mid-America Council board meeting were previously included in the newsletter. Motion to approve the January minutes was made by Bruce Hamilton and seconded by Bill Ramsay. Motion passed.

**TREASURER – Rick Bellmore**

Copies of the April Treasurer's Report were distributed at the meeting. Two chapter grants were paid during 3<sup>rd</sup> quarter of the IMA year. June 30, 2016 is the deadline for chapters to submit the post-event evaluation in order to get their grant money. The majority of the receipts during 3<sup>rd</sup> quarter of the IMA year were for LTS sponsorships. It is expected that there will be a profit from this year's Spring Conference/LTS. All speakers except one have been paid or reimbursed. A summary of expenses/revenue from the Spring Conference/LTS will be sent within the next month to council board members. Rick needs to send bills to chapters for what they agreed to pay for chapter members to attend LTS.

John Wieland motioned to approve the April Treasurer's Report and Bill Ramsay seconded the motion. Motion passed.

**VP-EDUCATION – Bruce Hamilton**

A recap of the Spring Conference/LTS was provided. There was good attendance at both days. For the Spring Conference, 34 people attended and the break-even point was 18 people. Emailing material in advance to people who had registered for the conference instead of having paper copies at the conference was successful. Harlan Fuller said it was helpful that people included comments in their registration form about topics that they would like him to cover in the Excel break-out session. David Skora presented a small gift to Eric Griffin for his help with communication for the conference and other times. Results from the evaluation forms will be sent to the council board members for review. David Skora said it is really helpful to get speaker ideas from chapters who have had the speaker present at one of their chapter meetings. David said to give speaker ideas to him and Bruce as early as possible since speakers need to be finalized and booked early. Rick Bellmore commented that not many students were at LTS. Bruce said that IMA Global will send out one email blast per quarter for councils and the conference should be included in as many of these email blasts as possible. The conference should also be included in the Council Round-up that is sent out by IMA Global. Additionally, emails can be sent to professors of universities about the conference. An idea that will be considered for future years is sending out the list of people registered for the conference to everyone that is registered in case they want to speak to a certain person during one of the breaks.

Discussion occurred about scheduling of next year's conference. A motion was made by Bill Ramsay and seconded by John Wieland to have the conference on April 20 and 21, 2017. Motion passed. Bruce will get these dates reserved.

Bruce said that an email will be sent to attendees of the Spring Conference/LTS thanking them for coming and giving the dates of next year's conference.



**REGIONAL VP** – David Skora

The next IMA Global board meeting will occur in June at the IMA Annual Conference. The previous meeting was in February in Phoenix, AZ. At the February meeting, the AICPA and ACCA merger was discussed, including the impact of the merger on IMA. IMA Global will increase marketing efforts about the CMA certification. Globally, there are around 80,000 IMA members. The financials for IMA show that IMA is a stable organization.

**VP-COMMUNICATIONS and DIRECTOR OF NEWSLETTER** – Eric Griffin and Angela Truong

The next council meeting will be on July 30, 2016 in either Janesville, WI or Madison, WI. The newsletter deadline will be Monday, July 11<sup>th</sup>.

Michele Reagan will serve as President for the July meeting.

**OLD BUSINESS**

None.

**NEW BUSINESS**

None.

**DIRECTOR OF STUDENT RELATIONS** – Kathy Horton (absent)

No report.

**BY-LAWS COMMITTEE** – Mary Strautmann (absent)

No report.

**LONG RANGE PLANNING COMMITTEE**—Harlan Fuller

No report.

**VOLUNTEER LEADERSHIP COMMITTEE** – David Skora

No report.

**PAST PRESIDENTS**

Many positive comments about this year's Spring Conference/LTS. Bruce said that they are considering barcodes on name badges instead of people writing their names to sign in. This is done at the IMA Annual Conference and other conferences and it works well. Barcode scanners can be purchased or rented. Bruce will investigate the cost and other considerations and will lead a discussion about this at a future council meeting.

**MOTION TO ADJOURN** – meeting adjourned at 4:50pm

Motion to adjourn by Bill Ramsay and seconded by David Skora. Motion passed.

Respectfully Submitted,  
Angela Truong, Council Secretary