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**VP Student Outreach**  
 Addison LePere \*\* ##  
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 Bruce Howard  
**Historian**  
 Simon Aguirre ##  
**Dir, Community Service**  
 Vic Dullas, CMA  
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 Ira Copple  
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**Newsletter Editor**  
 Hope Harrell \*\* ##  
 ++Past President  
 \*\*Passed 1st CMA Exam  
 @@ Passed both exams  
 ## Student member  
**Contact All Officers at**  
[SanAntonioIMA@gmail.com](mailto:SanAntonioIMA@gmail.com)

# IMA San Antonio Chapter Newsletter



The Association of  
Accountants and  
Financial Professionals  
in Business

SAN ANTONIO CHAPTER

**Chartered 1947—Our 74th year!!**

## Chapter President's Message



Dear IMA SA family,

The past three months were swept away in the planning of our Texas IMA Annual Conference. In fact, the planning committee spent more than a year preparing for the two-day event with over 100 people attending from across Texas. Overall, it was a valuable experience for all of us. We also received great feedback from the attendees as well as the speakers.

Due to the global IMA conference planned in Austin next year, we will not have a regional conference. Hence, the Houston Chapter will host the next Texas conference in 2023.

Moving forward, we want to expand our focus to also include community volunteer activities. Another chapter first, our first group volunteer event will take place in November (Please see report below).

Regards,

Farhana Khan

## Community Service Update from Vic Dullas, CMA



Saturday, November 13th we are doing our first-in-memory chapter community service project benefitting Habitat for Humanity! We need A BUNCH of support on this one to meet our commitment. Family members over the age of 14 as well as friends are welcome. There is no cost to attend and breakfast AND lunch will be provided. The full shift is from 7:45am-3:30pm but if you can only come for the morning or only the afternoon, we understand. We are doing this with Accounting Students from UTSA and Texas State, and with the Business & Industry members of the San Antonio CPA Society. It's going to be a great event and you won't want to miss it! Location and other details are on the chapter website.

## Annual sponsor:

[TCG Trusted Capital Group, LLP](#)

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## 2021 Calendar by Lacey Stratemann VP Professional Education

### 2021 Q1 Recap

Month/Date	Location	Topic	Speaker	Sponsor
January 14th	<del>San Antonio</del> Virtual	SA Chapter Board Meeting (All chapter members are welcome)	N/A	N/A
Jan 21st (2 hrs. CPE) <b>CMA Appreciation Night</b>	<del>San Antonio</del> Virtual	Forensic Accounting @ SAPD	Gilbert Barrera, J.D., M.P.A. (Professor, Texas A&M SA)	<a href="#">Bowtie Business Intelligence</a>
		The Impact of Recent Legislation and Litigation on ERISA Retirement Plans	Ryan Canales (Certified Plan Fiduciary Advisor, Empower Wealth Advisors)	
		<b>Student Member Internship Fair</b>		
Feb 18th (2 hrs. CPE)	<del>San Antonio</del> Virtual	Interview and Resume Tips	Kelly Kjlajic Powers (Managing Partner, Powers Professional Partners)	<a href="#">Houston Business Automation LLC</a>
		Components of a Good Anti-fraud Policy	Texas State University	
		<b>Student Member Internship Fair</b>		
Mar 18th (2 hrs. CPE)	<del>San Antonio</del> Virtual	Bowtie Business Intelligence Client Success Story	Olia Bosovik (Director of Sales & Marketing, Bowtie Business Intelligence) + Peter Swanson (Founder + CEO)	<a href="#">Powers Professional Partners</a>
		Applying lessons from the book, <u>Atomic Habits</u> , by James Clear	Kevin Eliassen (Data Mgt Analyst, Security Service Federal Credit Union)	

### Q2 Recap

April 8th	<del>San Antonio</del> Virtual	SA Chapter Board Meeting (All chapter members are welcome)	N/A	N/A
April 15th (tax day)	Virtual	No Meeting	N/A	N/A
April 22nd (1 hr. CPE)	<del>San Antonio</del> Virtual	Using games to train and engage accounting teams	Presented in Partnership with KC Mo chapter Zac Jarrad	N/A
April 23rd	Virtual	IMA's Women Leadership Summit	Multiple	N/A
April 24th 8:30 am	Virtual	Texas Council Meeting (All chapter members are welcome)	N/A	N/A
April 29th 1 hr. CPE	<del>San Antonio</del> Virtual	How to Present Data Meaningfully & Accurately	Mike Lovelace, CMA	N/A
May 20th (2 hrs. CPE)	<del>San Antonio</del> Virtual	Anti-Money Laundering Success Stories	Terri Wright (owner, Terri J Wright Consulting)	<a href="#">Becker CMA Review Course</a>
		IMA's PACE (Profit Analytics Center of Excellence) to compare strategy and the COSO framework for ERM (Enterprise Risk Management)	Fernando Hernandez (Sr. Director, MyABCM US)	
June 12	San Antonio	SA Chapter Board Meeting	N/A	N/A
Jun 13—16th (24 hrs. CPE)	Virtual	ACE 2021	Multiple	Multiple

### Q3 Upcoming Recap

Month/Date	Location	Topic	Speaker	Sponsor
Jun 17th (2 hrs. CPE)	Virtual	2 Hour Ethics Case Study	Jennifer Larson, CPA (Tax Manager/Sol Schwartz CPAs) & Russell Gaines, CMA (Operational & Financial Controller)	<a href="#">Brandon Howard CPA, PLLC</a>
July 15th (2 hrs. CPE)	Virtual (100%)	Working Styles of Different Generations	Bruce Howard (Exec Dir, South Texas Alliance of Career Champions) & Brandon Howard (UTSA Lecturer)	TBD
		Baby Steps to Getting Out of Debt and Building a Financial Legacy	Allie Medvecky (Controller, Cancer Insights LLC)	
July 17th 8:00 am	Virtual (100%)	Texas Council Meeting (All chapter members are welcome)	N/A	N/A
August 19th (2 hrs. CPE)	San Antonio (Hybrid)	Fraud, Lies and Hermes Ties (Fraud at HealthSouth)	Aaron Beam (Former CFO, HealthSouth)	TBD

### Q4 Upcoming Events

September + October	N/A	No Meeting (Please Attend Conference October 1st—2nd)	N/A	N/A
October 1st—2nd (12 hrs. CPE)	San Antonio Hyatt Hill Country Resort	Texas Council Annual Conference (In Person 100%)	Multiple	Multiple
October 19th	San Antonio (Virtual)	Enron, 20 Years Later	Joint offering with Texas State	TBD
October 21st	San Antonio Virtual	SA Chapter Board Meeting (All chapter members are welcome))	N/A	N/A
November 4th—6th	Virtual	IMA Student Leadership Conference	Multiple	TBD
November 13th	San Anonio (in person)	Service Project	Habitat for Humanity (See <a href="#">page 1</a> for details)	N/A
November 17th (1.5 hrs. CPE)	Corpus Christi (in person, Texas A&M Corpus Christi)	Intermediate Tips and Tricks Using Excel for Data Analytics	Brian Butler, Juern Technology	<a href="#">Juern Technology</a>
November 17th (1.5 hrs. CPE)	Laredo (in person, Texas A&M International)	Intermediate Tips and Tricks Using Excel for Data Analytics	Brian Butler, Juern Technology	<a href="#">Juern Technology</a>
November 18th (2 hrs. CPE)	San Antonio (Hybrid)	The Value of a CMA in a Not for Profit	Torey Reese, CMA (Controller @ Veterinary	<a href="#">Marketin gAi.de</a>
		Modern Day Financial Frauds	Ronald Long (4x Author and Former County Sheriff)	
December 16th (2 hrs. CPE)	San Antonio (Hybrid)	Getting Employees to Speak up with Ethical Concerns	Professor, Texas State University	TBD
December (TBD)	Brownsville Harlingen	TBD <a href="#">3 sanantonio.ima</a>	TBD <a href="#">net.org</a>	TBD

### Q3 Campus Outreach Update by Addison LePere, VP Campus Outreach

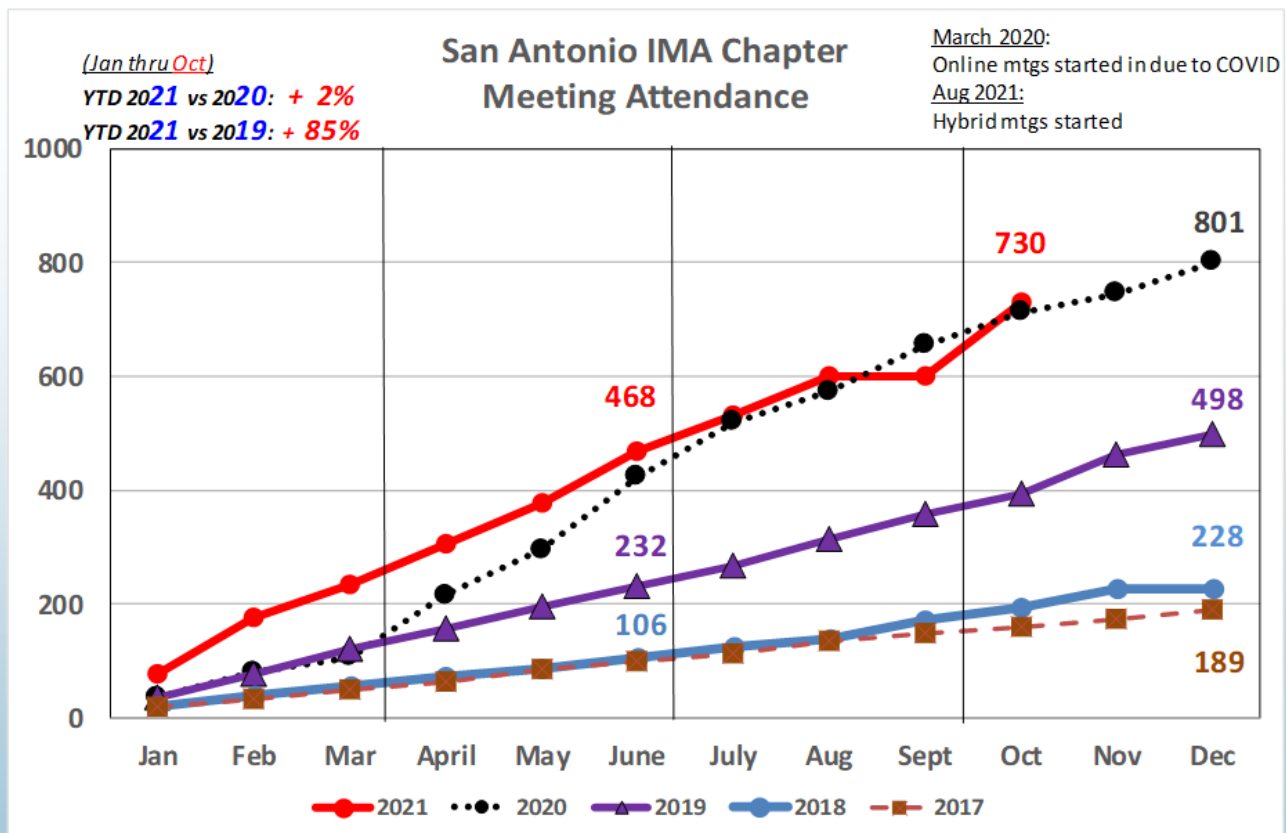
At this year's Texas Annual Conference, our chapter reached out to students in the region to offer them a significantly reduced scholarship opportunity to come learn from the event speakers and connect with current and potential chapter members. We had 11 students reach out to us to take advantage of this opportunity that was awarded to us through IMA Globe's MEF Grant that we earned last year. We received great feedback from the students that attended, and we hope that they will become more active members and CMAs in the future! We have campus presentations that we give to regional universities where we educate students about IMA and the CMA. If you have never participated in one of these, we encourage you to join one! We have a standard deck that we present, and we split up the speaking responsibilities by comfort zone. If you would like to join and watch one of these presentations before becoming a speaker, you can come along and be present. We give the students as many perspectives as possible to help them understand the opportunities they can earn from IMA and CMA, and what other options there are besides the Big 4. If you would like to join us for a presentation as a speaker or an attendee, please email [campusoutreach@sanantonio-ima.org](mailto:campusoutreach@sanantonio-ima.org).

### Social Media News by Amanda Craig, Digital Ambassador

The San Antonio Chapter of the IMA is still active on social media! We are posting regular updates about meetings and other great opportunities for our members from other chapters and IMA Global. Please follow us, to stay updated and get reminders about important events involving the chapter. If you would like to join our exclusive, controlled access LinkedIn group (IMA – San Antonio Chapter), [click here and request to get added](#). We have also established a new social media reference landing page called "Linktree", which allows us to list all our social media and links to other important resources. To access the Chapter's Linktree, [click here](#) or scan the QR code on this page.

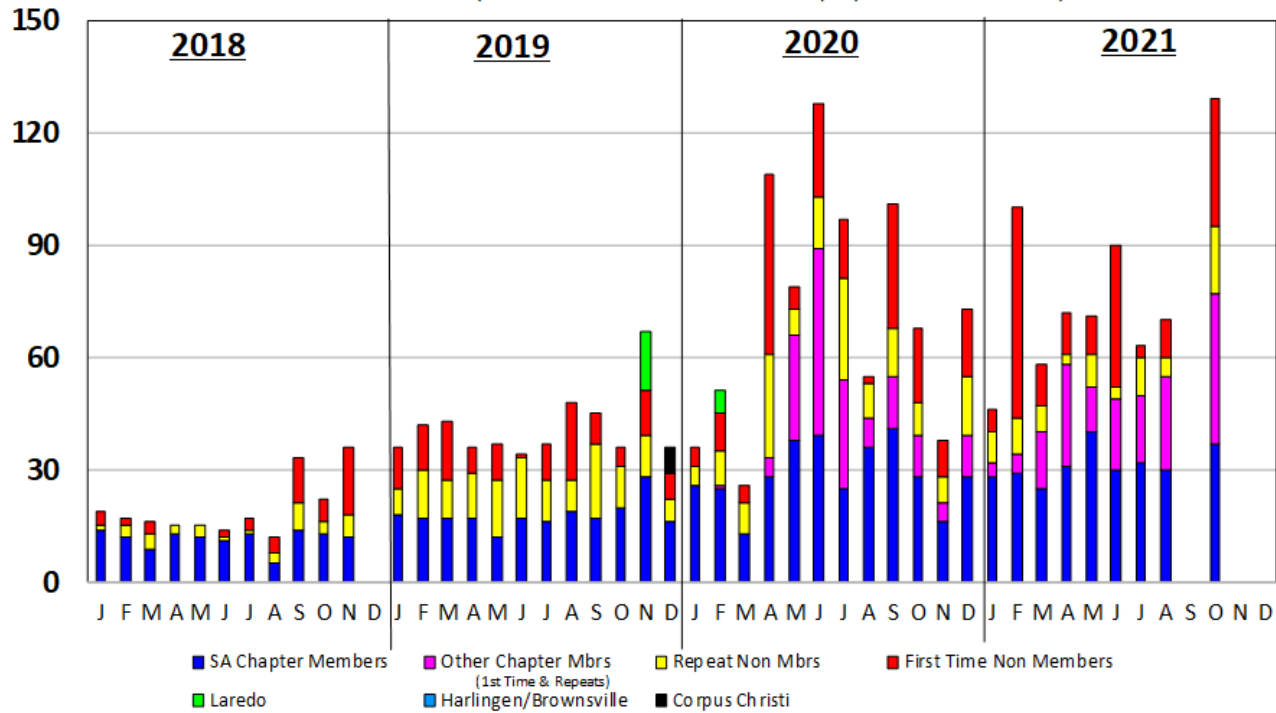


### Membership Update by Mike Lovelace, CMA, VP Engagement



## San Antonio IMA Chapter Meeting Attendance

Members vs. Other Chapter Members vs. Non Members (Repeats vs. 1st Timers)



### Membership Take-away's:

	<u>1/1/2019 vs 9/24/2021</u>		<u>% Increase:</u>
Regular members	111	148	33%
Student members	22	68	209%

### CMA Pipeline:

We are working with approx. 20 people who have confirmed their interest in entering CMA program – including several non-members (who will need to join before they take the exams)

In the last 2 testing windows, several CMA parts have been passed and 1 passed the CSCA.

We are continuing to recognize new CMA's & CSCA's with a Profile on social media (1 per month)

We expect to add another 5 – 8 CMA's (approx. total of 57 – 60) in the next 12 months (by Oct 1 2022).

### Texas IMA Annual Conference

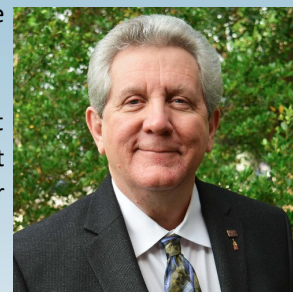




## **“Maintain Your Career Momentum” by Bruce Howard, Director of Workforce Development**

Hello everyone and welcome to the Fall! It’s a refreshing time of the year with cooler weather to give us a little “skip” in our step!

I know many of you have been working a lot on your career development strategy. Is it time to leave my current job? What are the options for me in my field of work? It’s a lot to think about, right? Keeping you up a little at night? So, here’s a gentle push---Don’t stop now! There are some things you can do that will help you keep your career development momentum going strong. Let me share some ideas with you:



### **Research companies**

Invest time each day to find out who are the employers in your career field. Analyze their companies to determine how you might fit into their organizations. Do you know who the top ten companies are in the sector you want to work in? Build a target list of companies that you want to pursue for employment opportunities.

### **Improve your resume**

How does your resume look? I don’t mean visually, I mean what does it contain as experience, skills, activities and especially accomplishments. Does it tell your “career story” well? Will it make a recruiter contact you for an interview? When describing your professional experience try to use the employer’s vocabulary so it matches their job description. Also, work on improving it by adding activities that will complement your career trajectory. One way you can do this is through volunteer work, see below and on [page 1](#) for details on how you can do service and network with other members! Raise your hand to raise your skills!

### **Talk to people and build your network**

Do your family and friends know what you want to do with your career? Are you sharing your ideas/plans with your network? Set a goal on how many new people you want to meet in the next 60 days? Get out and get found!

### **Start a journal**

No, not an accounting journal----but a career journal! Keep track of your activities. Record your networking meetings. Read and record news about companies moving into your area that may be of interest. Make lists. Build plans. Implement, review, and amend. Remember, you can manage what you measure.

It may be time to turn the clocks back, but if you maintain your career development momentum soon you will fall forward into another exciting opportunity! Need help? Contact me at [bhoward1925@gmail.com](mailto:bhoward1925@gmail.com).

### **Be an Important Part of Something New!**

How? By telling us your zip code! =)

This is a pilot initiative designed to demonstrate the value to IMA Global for how chapters can be more responsive to their members. Your chapter is partnering with 5 or 6 other chapters (to defray costs) to buy a single license for [eSpatial.com](https://www.espatial.com). This Software as a Service enables us to map member and visitor provided zip codes with meeting attendance frequency to give Board members a better understanding of where our attendees are and identify more convenient meeting locations. NOTE: In order to protect each member's data privacy, IMA does NOT disclose zip codes much less street addresses - to the chapter. If you have not previously opted in by providing just your zip code to the chapter, please email it to [SanAntonioIMA@gmail.com](mailto:SanAntonioIMA@gmail.com). No personally identifiable information will ever be uploaded to this software.

### **Get More Out of Your Membership**

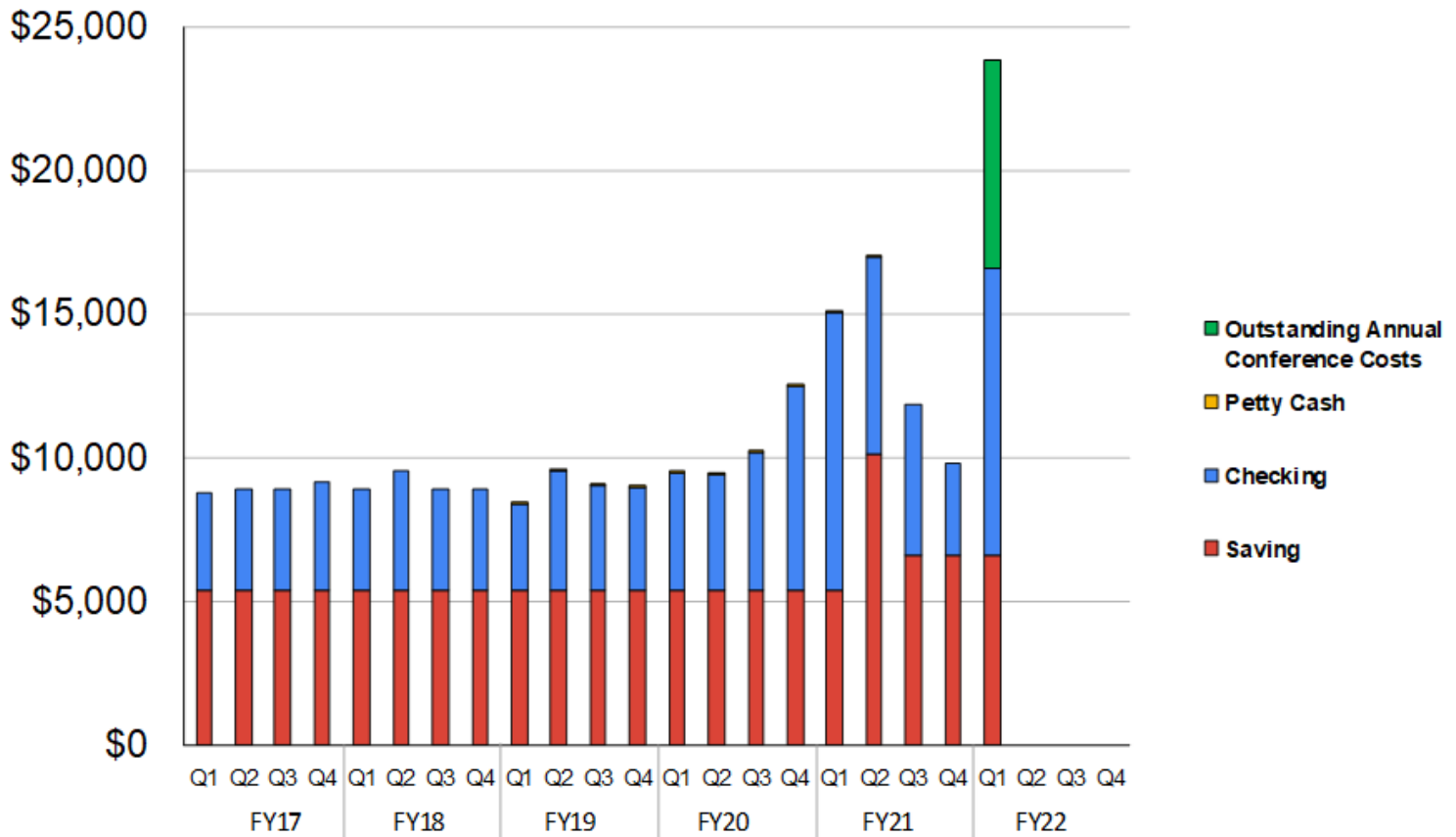
Get Involved! How much time do you have? (contact [SanAntonioIMA@gmail.com](mailto:SanAntonioIMA@gmail.com))

1 hour, 1 time:	Join a team making a campus presentation (happens throughout the year)
2 hours, 1 time:	Judge the student case competition submissions (happens in March)
2 hours/month:	Attend the chapter meetings (3rd Thursday of every month)
5 hours/quarter:	Help with these awesome newsletters! (doing these quarterly in 2021!)
1 hour/week:	Volunteer to join the Board in a role you are passionate about

## Treasurer's Report by Torey Reese, CMA, Treasurer

This past quarter was dominated by continuing our amazing CE opportunities and delivering for the Texas IMA Annual Conference. Overall, it was a great success and thank you to everyone who contributed to making it happen! Generally, income and expenses have been standard, nothing unusual to report. Our total cash balance for the end of September was \$23,500.

**IMA SA Ending Cash Balance by Account**  
(FY runs 7/1-6/30)



### Chapter Mission

The San Antonio Chapter (#0090) of the Institute of Management Accountants was chartered in 1947 and is part of the IMA Texas Council (Dallas/Ft. Worth, Houston, El Paso, Laredo and Austin). We exist to serve local accounting and finance professionals with continuing education programs and networking opportunities. If you are a college student, young professional, college faculty, or seasoned professional, we have services and meeting content that will help you in your career. If you are a retired professional, we can help you stay in touch with peers and remain informed on current topics.

### Did You Know?

You can support the chapter financially without even buying a meal?! IMA compensates a chapter for each of its members who attends and earns CPE from IMA webinars even if you don't need the CPE to maintain a license. It's not a lot, but over the course of a year and across all chapter members, it really adds up!

## Save the Date! Q1 + Q2 2022!

Date	Speaker	Title / Company	Topic
Jan TBD	Quarterly Board Meeting		
Jan 20th	<a href="#"><u>Joint meeting with Kansas City Chapter</u></a>		
	<b>CMA Appreciation Night!</b>		
	Monte Dwain (remotely from Utah)	Acctg Prof @ BYU	Revenue Management (or The History of Management Accountants)
	Lisa Lawler (remotely from Boston)	Author	New Perspective on Compliance & Deterrence (Occupational Fraud Deterrence)
Feb 17th	Dave Gust	Former Sales Executive, Datapoint	Datapoint: San Antonio's Original Tech Giant
	Kelly Powers	Owner, Powers Professional Partners	tbd: Employment Market Update
March 17th	Bob Wetesnik	Independent Medicare Broker	How to Navigate the Medicare Maze
	Angela King (remotely from CO)	Accounting Contract Administrator/Accounts Receivable, DTJ Designs	Accelerating the Customer Collection Process (How My IMA Membership Benefitted My Company)
Apr TBD	Quarterly Board Meeting		
April 21st	TBD	TBD	TBD
	TBD	TBD	TBD
May 19th	TBD	TBD	TBD
	TBD	TBD	TBD
June 23rd	tbd - Board Mbr #1	tbd	IMA Ethics
	tbd - Board Mbr #2	tbd	Mission Impossible: When Benchmarks Undermine Ethics