



The Association of
Accountants and
Financial Professionals
in Business

DAYTON CHAPTER



The

November, 2025

Balance Sheet

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DAYTON CHAPTER

Thank you for being a part of Dayton IMA, please join us!

FIRST SESSION SPEAKER

November 18, 2025
5:30 p.m.– 6:30 p.m.
The Amber Rose

Mark Sarver
First Financial Bank

Utilizing Strategic Bank Partnerships To Grow Your Business



Mark has been in banking for more than 25 years, starting out as a part-time teller. He joined First Financial Bank knowing he could do more for his clients. Mark doesn't count his wins by closing deals, he prides himself on doing what is right for the client to make them successful.

Learning about the client and building the relationship, Mark is able to bring solutions to the table that satisfy all parties. Mark's determination and dedication has resulted in him receiving several quarterly awards over his career, as well as the top sales award twice.

Staying connected in his community, Mark is involved with multiple organizations including sitting as treasurer for Centerville Hustle Basketball and Miami Valley Down Syndrome. He is also a board member of Homefull.

HAPPY THANKSGIVING!

SECOND SESSION SPEAKER

November 18, 2025
7:30 -8:30 p.m.
The Amber Rose

Tom Nichols
Dayton Dragons

The Dayton Dragons: Minor League Baseball's Greatest Success Story



Tom Nichols has been the voice of the Dayton Dragons since 2008, serving as their TV and radio broadcaster as well as the team's director of media relations. Tom has called more than 4,000 games since his career began in 1988 and was featured in the New York Times after receiving a call-up to the Cincinnati Reds after more than 30 years of minor league broadcasting.

His broadcast partners over the years have included many sports legends like Joe Morgan, Hank Aaron, Magic Johnson, and former Reds stars Barry Larkin and Eric Davis. Tom was inducted into the Greater Dayton Baseball Hall of Fame in 2024 based on his media work in Dayton.

INSIDE

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Visit the web-site at <http://www.dayton.imanet.org/>



President's Message



In October, we enjoyed hearing from Dan Young, the latest generation leading Youngs Jersey Dairy, and Rene Gindelberger of Treadwell Credit Union, who gave us many useful suggestions to avoid becoming victims of fraud. It was valuable information that we could share with others. This month's speakers are Tom Nichols, Director of Media Relations & Broadcasting for the Dayton Dragons, and Mark Sarver, Relationship Manager for First Financial Bank.

I plan to attend IMA's Student Leadership Conference in Cleveland, Ohio November 13-15 as a volunteer. I enjoy talking to the future accountants who attend the conference, and I appreciate what IMA does to engage the accounting students and help prepare them for what comes after their education.

The chapter board is still planning our dinner meetings for 2026 and our February student event. If you have any suggestions for topics and/or speakers, we welcome your feedback. I hope to see you at next week's dinner meeting.

We hope to see you at the meeting!

*Sincerely,
Tanya Shell, CMA, CPA, CSCA
Dayton Chapter President 2025-2026*

How IMA Helps Finance Professionals Lead Ethically

October 15, 2025

By: [Margaret Michaels](#)

October 15 is Global Ethics Day, an annual reminder that ethical leadership in finance isn't just about following rules. It's about protecting markets, companies, and the public trust that makes our profession possible.

The consequences of ethical failures are real and far-reaching. When a Macy's accountant intentionally hid small package delivery expenses from late 2021 through the third quarter of 2024, the company was forced to delay its earnings report and adjust its profitability forecast. Shareholder trust fractured overnight. According to a 2025 [Deloitte](#) report, ethical breaches like this can diminish share price, damage corporate reputations, erode customer confidence, and trigger increased regulatory scrutiny.

These aren't isolated incidents. Ethical lapses affect markets, companies, employees, and public trust. That's why accounting and finance professionals serve as "gatekeepers" of financial truth, and why organizations like IMA exist to support them in that role.

To be a member of IMA, you must abide by IMA's [Statement of Ethical Professional Practice](#). As a 100+ year old organization, IMA emphasizes the role of accounting and finance professionals as the "gatekeepers" of financial truth. For markets to function properly, accounting and finance professionals must report financial results accurately and provide transparency to investors about the financial health of organizations. Without ethics, there is no public trust in markets.

To read the rest of the article, [link here](#).

SAVE THE DATE

February 27, 2026 | 8 AM - 5 PM

IMA Ohio Finance & Accounting Summit 2026

Columbus, OH
Full day CPE



The Association of Accountants and Financial Professionals in Business

OHIO REGIONAL COUNCIL

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GLEIM SAVINGS

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Your Next Promotion Depends on What You Learn in the Next 6 Months

IMA blog, posted on October 23, 2025

By: [Lindsay Sakraida](#)

Picture this: a finance professional comes into the office every day and consistently delivers excellent work. They're smart, diligent, and loyal, executing flawless quarterly reports and earning praise from their manager. So far, so good. But then, when their review comes around, and the chance for a promotion arises, our finance professional is passed over. And this story repeats itself multiple times across the fiscal year. Why is this happening?

Our finance professionals' skills, once cutting-edge, no longer match what their business needs most.

This scenario is becoming all too common for those working in account management and finance, and it's happening across all career stages. In an era of rapid change, doing great work simply isn't enough anymore.

Careers advance when skills line up with the direction an organization or industry is heading, and those needs are shifting faster than ever.

In today's professional landscape, the distance between "relevant" and "obsolete" is shrinking. Back in 2023, [The World Economic Forum reported](#) that nearly half of all skills workers use would evolve in the next five years. A prediction that we've already seen turn to reality for many working in our industry. Here, technology, regulation, and business priorities evolve constantly, and the difference between career acceleration and stagnation comes down to what professionals are learning right now.

That means the next six months may be the most important window in your career trajectory.

Why 6 Months Is Your Critical Window

When we look across the business landscape, one truth emerges: the pace of change isn't slowing down. Technology evolves, markets fluctuate, and organizations restructure to stay competitive. Finance often sits at the epicenter of these kinds of transformations.

Take one of the most widely touted of these transformations: automation. From AI to machine learning, the development and application of these technologies are reshaping the pace and scale of an accountant's work. [PwC research from 2024](#) found that 63% of top-performing companies were increasing cloud budgets to leverage GenAI, and 67% said they were already realizing value in using GenAI for products and services innovation.

And these numbers are nearly a year old. When technology moves the trajectory of companies this quickly, there's simply no time to lose.

Let's also not forget the time it takes to learn and then be able to actionize new expertise. For instance, [CSR Education recommends](#) that 90 days after training completion, someone may be ready to practically implement their new skills and demonstrate their impact to an employer.

To read the rest of the article, [link here](#) .

2023 CHAPTER OF THE YEAR
SOUTHWEST OHIO CHAPTER

7th Annual
DAYTON
FRAUD, CYBER & ETHICS CONFERENCE

ACFE®
Association of Certified Fraud Examiners

VIRTUAL EVENT
NOVEMBER 19th & 20th
2025

12:00PM-4:30PM EASTERN

Southwest Ohio Chapter

8 total hours of CPE* (4 each day)
including 2 hours of ACFE Ethics/Ohio PSR Ethics credit.

Pricing: **EARLY BIRD** (By October 31, 2025)
\$75 one day | \$100 both days
Regular Price:
\$100 one day | \$125 both days

REGISTER AT: swohacfe.org



KEN DIEFFENBACH, CFE, CCEP
Executive Director, Pandemic Response
Accountability Committee
ACFE Regent Emeritus

How Data Analytics Can Help Address Fraud in Federal Grants
In FY '24, the federal government awarded over \$1T in grants, of which approximately 83% went to state governments. In this session, we will discuss the primary fraud and other compliance risks in grants and how big data and technology can help better target limited-oversight resources. We will also discuss the role and future of the PRAC.



DANIEL PORTER, CFE
Investigative Fraud Consultant, D. Porter Solutions
Interview Techniques and Detecting Deception
The ability to create and ask good questions, as well as the ability to know when someone is being deceptive, are important skills for managers, auditors, and investigators. This two-CPE session will improve attendees' interview techniques and lie detection abilities. Videos from movies, TV shows, and public figures showcasing the behaviors of liars will be included.



ERIN WEST
Founder, Operation Shamrock
The Billion-Dollar Heist of a Generation - and How We Stop It
During this presentation, former prosecutor Erin West will show attendees that pig butchering scams are not just financial crimes - they are a national security crisis. Organized criminal networks are stealing a generation's worth of wealth, exploiting psychology at scale, and destabilizing trust in financial systems. This is an attack that demands collective action: law enforcement, regulators, financial institutions, tech platforms, and the public all have a role to play.

NOVEMBER 20th



MARK GODSEY
Professor of Law and Director, Ohio Innocence Project at the University of Cincinnati College of Law
Wrongful Convictions and the Limits of Investigative Objectivity
CFEs are required to conduct investigations with due professional care, integrity, and objectivity. In this session, the presenter will discuss the problems of wrongful convictions of innocent people. He will also share how, without corrective measures, human frailties such as bias and tunnel vision undermine our ability to achieve accurate results in investigations.



RICHARD ANDERSON
Supervisory Special Agent, FBI Cincinnati Cyber
Cyber-Crime: FBI Update
In this session, the presenter will be speaking on the FBI's perspective on cyber-crime. Topics will include the impact and losses due to cyber-crime, the cyber threat landscape observed by the FBI, common attack vectors and scams, as well as tips attendees can use to protect themselves.



MICAH HOFFMAN and GRIFFIN GLYNN
Owners, My OSINT Training
Building Your Investigative OSINT Toolkit
Using the right tools in the right situation is essential in online investigations, and there are many tools in the OSINT space. The presenters will reveal some of their favorite free OSINT tools that every OSINT practitioner needs, and they will show how to master them. Attendees will discover how a few, highly capable tools can allow them to dive deeper into online investigations and succeed.



LEAH LANE, CFE
Director, Investigation Practice, SunHawk Consulting, LLC
2025 ACFE Baker Award Recipient, ACFE Regent Emeritus
Ethics in the Anti-Fraud Profession
CFEs are required to embody the highest standards of ethics and professionalism and to abide by the ACFE Code of Professional Ethics. Referencing ACFE standards and case studies, the speaker will provide an engaging discussion on how attendees can navigate ethical considerations encountered in their work.

Co sponsors:



*CPE credits are based on a 50-minute hour. CPE credits are offered through the ACFE as well as the Accountancy Board of Ohio (sponsor number CPE.00467).

UPCOMING WEBINAR SCHEDULE

INSIDE TALK

Practical Applications of AI in Finance & Accounting

Wednesday, November 19, 2025, from 1:00 p.m. to 2:00 p.m. (EDT)

Field of Study – Information Technology–Emerging Technologies in Accounting

Join us as we explore how AI technologies streamline processes like data analysis, fraud detection, and forecasting within finance and accounting. We also will discuss real-world AI use cases, tools for automating repetitive tasks, and strategies for improving accuracy in decision making.

Surviving the Currency Storm

Tuesday, November 25, 2025, from 1 p.m. to 2:00 p.m. (EDT)

As finance leaders prepare for 2026, navigating volatile markets and uncertainty has never been more vital. Join us as leaders from Convera deliver an economic update and present strategies for surviving the storm in today's volatile currency markets.

Defying the Gravity of Manual Spend: A Path to Audit-Ready, End-to-End P2P

Wednesday, December 3, 2025, from 1:00 p.m. to 2:00 p.m. (EST)

Field of Study – Information Technology– Digital Transformation & Innovation

To stabilize global profits and compliance, the strategic mission is clear: Conquer the chaos of complex spend and escape fragmented systems. This webinar features Planet Labs' Christine Ta alongside Coupa's Jennifer Carpenter as they discuss Planet's journey from niche point solutions to full (procure-to-pay) P2P transformation, optimized spend control, and real-time visibility. Discover how Planet made the case to replace a patchwork of systems (Jira, Concur, Google Docs) with a complete Coupa platform that positions them for future growth. Learn how the shift to a unified P2P platform allowed Planet to automate procure-to-pay, simplify intake, accelerate invoicing and payments, secure guaranteed SOX compliance, and master their financial orbit.

Check out all IMA [Webinars Here](#)

Global IMA Career Center

How to Build Your Personal Brand

By: Donovan Burba

