



The Association of
Accountants and
Financial Professionals
in Business

The

March, 2026

DAYTON CHAPTER



Balance Sheet

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DAYTON CHAPTER

Spring into some professional development and join our next meeting!

DAYTON IMA CPE OPPORTUNITY (2.0 Hours)

Tuesday, March 17, 2026 – starting at 5:30 pm – The Amber Rose Restaurant

IMA Ethics Program – *Navigating Ethics in a Digital World*

The goal of this workshop is to raise awareness of ethical considerations caused by the rapid technological advancements of the digital age so accounting and finance professionals can maintain the standards set out in the IMA Statement of Ethical Professional Practice and use its framework to make good, ethical judgements.

Learning objectives 1. Define the purpose of select emerging technologies as applied in accounting and finance. 2. Identify examples of ethical challenges posed by the implementation of emerging technologies in accounting and finance. 3. Describe how risks associated with emerging technologies relate to the IMA Statement of Ethical Professional Practice. 4. Explain the ethical considerations needed to govern and manage data. 5. Recognize how these ethical implications have created a need for upskilling across the accounting and finance profession.

We will begin at 5:30 p.m., take a break for dinner around 6:30 p.m and then conclude the program after dinner. Beef Rouladen is the main entrée, with Vegetable lasagna as the vegetarian option available.

ANNUAL CMA NIGHT

Please join us for this annual Ethics event. We love to celebrate our members with the CMA Certification.

Interested in learning more about the CMA Certification? Come and network with members and learn about their experience and the impact the certification has had on their career!

Thinking about the exam? There is a webinar about the exam and the upcoming changes...see the details on page 4.



IMA's Certification for
Accountants and
Financial Professionals
in Business

The CMA Exam
Format is Evolving

Learn what's changing
and how to prepare

Get the Details

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

PRESIDENT'S MESSAGE

Thank you to the chapter members who attended our student event last month. We had three good sessions including a panel of professionals who shared information on their management accounting/finance backgrounds as well as sessions on “Launching Your Accounting Career” and “The Art of Asking Questions.”

Please plan to attend our CMA Night / March Dinner Meeting next Tuesday, March 17th, when we honor our Dayton Chapter CMAs in attendance. We will be offering two hours of Ethics CPE.

IMA is accepting applications for chapter board members up until April 30th. If you have an interest in joining the Dayton Chapter board in a leadership role or volunteering in a limited capacity, there are quite a few positions available. Please reach out to Paul Myers or me for more information. We welcome any volunteers and thank you for your consideration.

We are in the Early Bird registration through April 17th for the IMA26 conference that will be held in Tampa, Florida June 14th – 17th. Chapter members can save an additional 10% when they use code CHAPTER10. IMA26 is a powerful opportunity to advance your careers while also strengthening your local chapter community.

Look for communication on a Dayton Chapter social in the coming months. We tried to avoid winter because we know how unpredictable Ohio weather can be, and this coming week is a good example. Hope to see you soon!

*Best regards,
Tanya Shell, CMA, CSCA, CPA
Dayton Chapter President*

ima26 CONFERENCE – EARLY BIRD STILL AVAILABLE



Enjoy connecting in beautiful, sunny and Tampa, Florida

Chapter members save an additional 10% with code CHAPTER10 when they register by April 17.

Join us for:

- **Real skills in AI, analytics, and automation** through workshops designed to keep you ahead.
- **Lasting peer connections** with finance professionals who understand your challenges.
- **Leadership and strategic decision-making capabilities** that position you for advancement.
- **Personalized learning paths** with tracks for every career level, including the CFO Alliance Track for senior executives.

The best part of any IMA conference? The people. We hope you'll be one of them again this June.

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

IMA Names Anthony N. Caspio, CMA, as Chair-Elect for the 2026-2027 Fiscal Year

MONTVALE, N.J., March 2, 2026 — IMA® (Institute of Management Accountants) today announced that Anthony (Tony) N. Caspio, CMA, a retired Fortune 500 business executive, has been named Chair-Elect for IMA's fiscal 2026–2027 period (July 1, 2026, to June 30, 2027). In this role, Caspio will support incoming Global Board Chair Brigitte de Graaff, Ph.D., CMA, CSCA, FMAA, who assumes the chair position on July 1, 2026. Caspio will begin his own tenure as Chair for the fiscal 2027–2028 period.

Caspio brings more than 25 years of extensive leadership experience from his career at Sealed Air Corporation, where he most recently served as Vice President–Supply Chain, Global Equipment, overseeing operations across four continents with supply partners worldwide. Throughout his tenure at Sealed Air, he held various senior finance leadership roles including global supply chain finance and global division finance, and he played an active role in numerous acquisitions and divestitures. Prior to joining Sealed Air, Caspio held leadership positions in the nonprofit, service, and distribution industries. He earned his Bachelor of Business degree in accounting from Western Illinois University.

“Tony’s journey mirrors that of many of our members. He earned his CMA to differentiate himself, built a distinguished global career, and has remained actively involved in the IMA community,” said Mike DePrisco, President and CEO at IMA. “As the profession continues to evolve, I am confident his leadership will help strengthen IMA’s role in empowering and connecting business professionals to build a positive future.”

An IMA member since 1997, Caspio has demonstrated exceptional commitment to the organization for nearly 30 years. He currently serves as Chair of the Global Markets Committee and is a member of the Governance Committee. He chaired the Strategic Planning Committee for the 2024–2025 fiscal year and led the Annual Conference Program Committee in 2020. Caspio also served five years on the Performance Oversight and Accountability Committee, where he chaired both the Investment and Policy and Survey subcommittees. In recognition of his outstanding service, he received the IMA Exemplary Board Member Award in 2018. Beyond his Global Board service, Caspio has been instrumental in chapter revitalization efforts, including serving multiple terms as president of the IMA Carolinas Regional Council. Most recently, he is helping to advance IMA's mentoring program partnership with SetFire Foundation by actively mentoring undergraduate students as they prepare for successful careers.



SAVE \$200
with early bird rates!

ima26 Accounting
& Finance
Conference
JUNE 14-17, 2026 + TAMPA, FL

Where the industry
comes together

Register Now

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

UPCOMING WEBINAR SCHEDULE

From Cost Center to Cash Engine: AI in Collections

Wednesday, March 25, 2026 from 1 p.m. to 2:00 p.m. (EDT)

Field of Study – Business Management & Organization– Digital Transformation and Innovation

This webinar explores how finance leaders can transform their accounts receivable collections from a reactive cost center into a strategic cash flow engine. It details a modern approach where AI and automation handle routine work, freeing teams to focus on high-impact activities. Join us and learn how to leverage data-driven strategies and intelligent tools to improve working capital, accelerate cash flow, and reduce revenue leakage. Attendees will leave with a practical playbook for building a more efficient and strategic collections function, turning their A/R team into a significant driver of financial performance.

Strategic Implementation and Business Value of AI

Wednesday, April 1, 2026 from 1 p.m. to 2:00 p.m. (EDT)

Field of Study – Information Technology– Digital Transformation and Innovation

AI is rapidly reshaping the finance function, from automating close processes to enhancing forecasting, regulatory compliance, and strategic decision making. But realizing meaningful business value requires more than experimentation with new tools. It demands a clear strategy, cross-functional leadership, measurable ROI, and thoughtful change management.

In this webinar, presenters will walk through a practical finance use case that demonstrates how organizations can design an AI roadmap, lead cross-functional initiatives, evaluate pilot outcomes, and scale AI capabilities responsibly. Participants will explore governance considerations, readiness criteria, and financial impact metrics used to assess efficiency gains, cost savings, revenue enhancement, and quality improvements.

Attendees will leave with a structured framework for aligning AI initiatives with business priorities while ensuring compliance, accountability, and sustainable transformation across the organization.

To stay current on all upcoming webinars, please bookmark this link:

<https://www.imanet.org/education-center/webinars>

Just a reminder that you can watch archived webinars if there is a topic that you would like to learn more about to further your knowledge and/or support your organization. You can link to those on the same page with the link above.

The Future of the CMA Exam: Case-based Questions Explained

Thursday, March 17, 2026 from 12:00 p.m. to 1:00 p.m. (EDT)

The CMA exam is evolving. Beginning in the May/June exam window, candidates will have the option to complete the English exam using either essays or case-based questions.

Join us for a live session where we'll walk through what case-based questions are, why IMA is making this change, and when the transition will take place. You'll gain a clear understanding of what's changing, what's staying the same, and how this evolution maintains the rigor and global standard of the CMA.

We'll also feature a live demo of a sample case-based question, so you can see exactly what to expect.

Whether you're a candidate, educator, or partner, this session will give you the clarity and confidence you need to prepare for what's ahead.

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