



DAYTON CHAPTER



Balance Sheet

VOL. 99, NO. 2

DAYTON CHAPTER

NEW MEETING VENUE – AMBER ROSE – 1400 Valley Street, Dayton

DAYTON IMA CPE OPPORTUNITY (2.0 Hours)

Tuesday, September 16, 2025 – starting at 5:30 pm –

IMA Leadership Academy Program – *Negotiating*

Many people lack confidence in their ability to negotiate or at least think they could improve at negotiating. This course looks at how negotiation happens in all aspects of our lives, every day, and then some of the tools that make negotiation easier and more effective. We also uncover some obstacles to effective negotiation and how to overcome them, including the challenge of negotiating remotely, how social media impacts negotiations, and dealing with negotiation anxiety, among other obstacles. The course also looks at the skills involved in negotiating and how to develop yours and goes step-by-step through what happens before, during, and after a negotiation. Build on whatever skills you currently have to become better at negotiating.

Learning objectives: 1. Define Negotiation, it's purpose and the types of negotiation 2. Describe the tools and skills used in negotiation. 3. Identify types of negotiation. 4. Explain how to overcome barriers and obstacles in negotiation.

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.

DAYTON IMA DINNER MEETINGS - LOOKING FOR A GOOD DEAL?

We are excited to continue our annual subscription plan! You can save both time and money in the upcoming year by prepaying for all of your dinner reservations at once. You save part of the cost of a dinner, and as importantly, you don't have to bother with a payment each month nor do you have to make a reservation—your place will be waiting for you! If you can't make it one month, you can offer it to a co-worker or friend, just let us know if plans are changing.

**Prepayment is only \$190 if paid by September 16, 2025.
It's a 15% discount!**

For those of you who prefer to make a reservation each month, the rates will continue to be \$32 for members and \$37 for non-members.



If you would like to take advantage of this limited time offer, please make checks payable to "IMA – Dayton Chapter" and bring them to the September dinner meeting. Please confirm with Paul Myers, at dayton@imachapter.org now or when you register for the September meeting.

The venue change and support from IMA is helping the chapter to hold members prices for the **SEVENTH** year!

Visit the website at <http://www.dayton.imanet.org/>

PRESIDENT'S MESSAGE

I look forward to the start of our dinner meetings next week on Tuesday, September 16th. The chapter board researched meeting venues over the summer and decided on Amber Rose Restaurant and Catering for the fall meetings and likely into next calendar year. We are pleased to offer the prepaid dinner plan and individual meeting attendance for professionals at the same price as last year.

We have hosted social events in various locations around the Dayton area over the summer and appreciate those who took the time to attend. We will continue to do this throughout the year, as we know that not all members can attend the in-person dinner meetings on the third Tuesday of the month. If you have any suggestions on locations for social events, please share. We also appreciate any suggestions for meeting topics and/or speakers for the coming year.

I hope to see you at the meeting!

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

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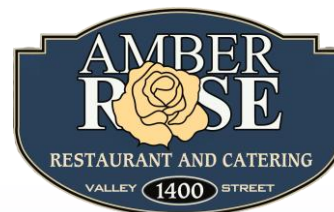
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MEETING VENUE CHANGE

To maintain meeting meal pricing at affordable levels, we are trying out a new venue this fall:

THE AMBER ROSE

1400 Valley Street
Dayton, OH 45404



We have looked at venues that will keep us fairly centrally located near or in the downtown area.

At this location, we will be using one of the meeting rooms upstairs. It will be a full dinner served buffet style and will include dessert. There will also be access to the bar.

Please join us and tell us what you think about this location!

IMA Expands Competency Framework for Accounting and Financial Professionals

MONTVALE, N.J., June 22, 2025 – IMA® (Institute of Management Accountants), today announced at the annual IMA Accounting and Finance Conference the expansion of its industry-leading Competency Framework. This blueprint defines professional needs, develops relevant solutions, and delivers the education, certification, skills development, research, and insights that empower management accountants and financial professionals in business to succeed. The expanded framework inclusively builds on the current domains and responds to evolving realities, ensuring practitioners remain trusted strategic business partners who safeguard and create value.

The new framework expands to include skills that have become essential in today's business environment. These broader, cross-functional skills are critical for finance and accounting professionals to succeed as the profession evolves. These skills also help IMA connect with professionals in related fields, such as data analysis, business operations, information technology, and project management, who work closely with finance teams and share similar goals and challenges.

"The IMA Competency Framework is a fresh, future-ready blueprint designed to guide your growth and development. It's built to reflect where accounting and finance are going, not just where they've been, and the skills and competencies required for success. It's about giving professionals the confidence and clarity to own their next move and the knowledge and tools to prove it," said Michael DePrisco, President & CEO, IMA.

Harnessing the organization's legacy of innovation, this new blueprint reinforces the critical role and the evolving skills of the profession and builds its offerings around those insights. From technical fluency to strategic leadership, IMA's offerings reflect the core capabilities needed to succeed in today's roles—and tomorrow's careers.

This framework is ideally suited for businesses and enterprises, where IMA programs are built on a dynamic model of competencies required across finance and accounting roles, making learning aligned, scalable, and tied directly to business impact. The expanded framework details each domain and embedded competencies. It offers practical guidance for professionals, employers, organizations of varying sizes, industries, educators, and regulators.

IMA STUDENT LEADERSHIP CONFERENCE 2025

The Conference is in nearby Cleveland, Ohio this year.

Ohio Regional Council will be offering scholarships to help cover registration.



Learn from expert speakers about the latest trends in the profession.



Network with recruiters from top companies seeking interns and full-time hires.

ima Student Leadership Conference
November 13-15 • Cleveland

Visit the website at <http://www.dayton.imanet.org/>

UPCOMING WEBINAR SCHEDULE

INSIDE TALK

AI-Driven World

Wednesday, September 10, 2025 from 1:00 p.m. to 2:00 p.m. (EDT)

Field of Study – Information Technology– Digital Transformation and Innovation

Join David Jani from Software Advice and Blake Oliver from Earmark as they discuss how to navigate accounting software selection in today's AI-driven landscape. Learn how to choose systems that align with your business needs and which AI-powered tools to prioritize to boost efficiency, streamline workflows, and maximize return on investment. Whether you're evaluating new software or optimizing existing systems, gain actionable insights to make informed, strategic decisions.

AI: Managing Opportunities and Threats

Monday, September 22, 2025 from 1:00 p.m. to 2:00 p.m. (EDT)

Field of Study –Management Services – Emerging Technologies in Accounting

Join us as we explore how to identify and evaluate the opportunities and threats associated with AI strategies using proven frameworks, including the Strategic Risk Assessment Process, Return Driven Strategy, Strategic Risk Management, and Strategic Life-Cycle Analysis. Designed for management accounting professionals, this webinar will support the development of strategic risk management as a core competency, specifically in the context of evaluating and guiding AI-related initiatives. As organizations increasingly rely on AI, these skills are essential to understanding how businesses can both create and protect value through effective AI strategy

To check out upcoming webinars at any time, members can visit:

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

WANTING TO LEARN MORE ABOUT THE CMA EXAM?

Upskill with the CMA

Tuesday, September 16, 2025 from 12:00 p.m. to 1:00 p.m. (EDT)

Are you an accounting or finance professional who wants access to greater career opportunities, the chance to earn a higher salary, and a seat at the leadership table? Or maybe you're a manager, looking for ways to upskill your accounting or finance team?

If so, then this one-hour interactive discussion is for you! Join us as we explore why the CMA® (Certified Management Accountant) certification is a global passport, helping to create true business partners who drive strategy and decision making. Discover how the CMA can future-proof you and your team with the skills needed in today's technology-driven economy. You'll also hear from an expert panelist who will discuss the value of the CMA to his career and organization.

