



The Association of
Accountants and
Financial Professionals
in Business

DAYTON CHAPTER



The

January, 2026

Balance Sheet

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DAYTON CHAPTER

Welcome 2026 by joining us for some warm networking!

FIRST SESSION SPEAKER

January 20, 2026
5:30 p.m.– 6:30 p.m.
The Amber Rose

Ryan White, CPA and Adam Titus, CPA
Brady Ware & Company

Annual Tax Update



Ryan White is a Tax Manager at Brady Ware's office in Dayton, Ohio. He has worked on tax engagements with business clients in various industries. He has experience with federal income tax, multi-state income tax, and municipal income tax. He also has experience with fiduciary tax and corporate tax provisions. He joined Brady Ware & Company in January 2020.

Ryan is a Certified Public Accountant in the State of Ohio. He is a graduate of Wright State University where he earned Bachelor of Science degrees in Accountancy and Financial Management, as well as a Master of Accountancy degree.



Adam Titus brings over a decade of expertise to his role. Adam specializes in crafting innovative tax solutions for a diverse clientele, covering industries such as [manufacturing](#), [construction](#), and [real estate](#). Adam specializes in

providing tailored solutions, recognizing that each business is unique and requires a customized approach.

SECOND SESSION SPEAKER

January 20, 2026
7:30 -8:30 p.m.
The Amber Rose

Mark Clower, CMA
FocusCFO

Business Transition Planning



Mark has over 30 years of experience in finance and operations, including working directly with entrepreneurs. He has experience in the Technology, Manufacturing, and Professional Service industries. His experience also includes start-ups, family-owned businesses and involvement in mergers and acquisitions, and he has strong executive management experience.

He has helped clients: navigate an economic crash, renegotiate financing with material savings, find excess funding, streamline operations and cut expenses, renegotiate pricing and improve financial reporting.

Mark is currently a partner with FocusCFO. He is a Certified Management Accountant and a Past-President of the Dayton IMA Chapter. He has degrees from the University of Cincinnati and The Ohio State University. .

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



President's Message



Happy 2026! It was nice seeing some of you at our chapter holiday social at Carillon Brewing Company last month. I hope everyone enjoyed the holiday season and your new years are off to a good start.

We resume our chapter meetings this month. We will host a tax update from Brady Ware at the 5:30 p.m. session of our January 20th meeting, and it will be held in person. Mark Clower, one of our Dayton Chapter Directors, will serve as the post-dinner speaker on the topic of Business Transition Planning. Please brave the January weather and plan to attend.

Next month I will share information on our Student Event scheduled for Friday, February 20th during the day. Registration is open for the 1st Annual Ohio Finance & Accounting Summit that will be held at the Quest Conference Center in Columbus, Ohio on Friday, February 27th. You can save if you register by January 26th. Please see emails from Paul Myers or the Ohio Regional Council website to register. Hope to see you there!

We hope to see you at the meeting!

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

IMA OHIO FINANCE AND ACCOUNTING SUMMIT

Hopefully, members have seen some communications come through regarding this event.

This is to remind you that there **ONLY SEVERAL DAYS LEFT** to get the early bird pricing of **just \$200 for 7.5 hours of CPE**. Our **1st Annual Ohio Finance & Accounting Summit** will be a great opportunity for you and your team to take a day for some professional development.

This year, we have 7 programs covering

- Artificial Intelligence
- Cybersecurity
- Strategic Planning in an Era of Highly Economic Uncertainty
- Economic Development Incentives
- Crucial Communications Team Building Secrets
- Leadership & Ethics
- "Reaching New Heights".

Hear from some of the biggest names on each of these topics. With so much CPE on offer, the conference offers great value.

The **first 75 registrants** will receive a **free copy** of Allan Mallory, book "Summits of Self".

Booking by 1/26/26, you can save up to \$25 on your registration. Register now and save! The **first 75** registrants will receive a copy of Allan Mallory, book "Summits of Self".

REGISTRATION Link:

<https://bit.ly/3YqS7ar>



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

IMA TECHNOLOGY SHOWCASE

See the Future of Finance *in Action*

Join on Thursday, March 12, 2026, for the first-ever IMA Technology Showcase, a full day of live demos featuring the tools shaping the finance and accounting functions.

Make *Smarter* Technology Decisions

Compare top technology solutions efficiently—all in one place, with experts ready to answer your questions.



Work Smarter, Not Harder

Evaluate tools that automate routine tasks and free you to focus on strategy.



Stay Ahead of Change

Position yourself and your team for what's coming next.



Learn From Use Cases

See how tools perform in practice with real-world use cases.



Find Your Perfect Fit

Compare solutions and ask questions in real-time.

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ADAM TITUS BIO CONTINUED

Adam's journey at Brady Ware commenced immediately after college, and by 2022, he assumed the role of Director. His dedication to staying current in tax trends, coupled with his comprehensive financial knowledge, positions him as a valuable asset in helping clients secure the best deals. He holds degrees from Villanova University and California State University and is a member of the Ohio Society of CPAs.

Adam and Ryan graciously presented to the chapter in January, 2024.

You can check out the firm at bradyware.com.



BRADY WARE

IMA and CPA Crossings Sign National Partnership Agreement

MONTVALE, N.J., December 11, 2025 — IMA® (Institute of Management Accountants), one of the largest and most respected associations focused on advancing the management accounting profession, and CPA Crossings (CPAx), a trusted and leading provider of continuing education to accounting and finance professionals, have entered into a collaborative partnership agreement to serve professionals worldwide.

Under the new collaboration, IMA and CPAX will work together in marketing, selling, and offering each other's courses and certificates to CPAX's national distribution partners—which consist primarily of state CPA societies—and to IMA's members across the globe. CPAX partners will seamlessly access IMA's content and learning opportunities directly through CPAX, allowing for an easy transition to IMA's learning platform and dozens of courses. IMA members will secure CPAX courses through IMA's current course catalog, also for seamless access.

“We're thrilled to partner with CPAX to bring IMA's learning resources to accounting professionals nationwide,” said Mike DePrisco, president and CEO at IMA. “Whether you're in public accounting looking to transition to industry or aiming to upskill in topics most relevant for business today, this partnership gives you access to the skills and credentials that transform technical precision into strategic influence. Together, we're helping professionals build sustainable and impactful careers.”

The courses will be available at a discounted rate and focus on topics that include AI, sustainability, data analytics and visualization, financial planning and analysis, cybersecurity, and leadership. IMA and CPAX will also regularly inform each other about general market developments and market factors relating to each other's products, services, customer implementations, and current projects.

“Our learning platform is greatly enhanced by adding IMA's courses and certification programs to our distribution partners in the U.S. and Canada, and the unique value will resonate with our learners. As continuing education becomes more niche and specialized, CPAX continues to position itself as a learning solution for all accounting and finance professionals, whether they are in public accounting or corporate finance,” said Rob Wilker, CEO at CPAX.

To access the resources now available at special prices through this collaboration, visit www.cpacrossings.com/industry-certifications.

About CPA Crossings (CPAX)

CPA Crossings (CPAX) is a trusted partner in delivering virtual and in-person continuing education to accounting and finance professionals. CPAX provides cutting-edge e-learning using best-in-class technology. The organization partners with over 65 nationally recognized subject matter experts in their respective fields to identify, produce, and deliver some of the highest-quality learning and knowledge materials available in the industry. CPAX's service offerings include a growing portfolio of over 3,500 scheduled webinars and on-demand courses. CPAX has a longstanding relationship with CPA societies across North America and is NASBA certified. For more information, visit www.cpacrossings.com.

**Focus your learning,
fuel your growth**

Choose courses by competency domain to target your skill needs, align with your career goals, and stay prepared for the demands of accounting and finance today and tomorrow.

Find the course that's the best fit for you

Select language

IMA OHIO Finance & Accounting Summit



KEYNOTE SPEAKERS



Mike DePrisco
IMA President &
CEO



Gaby Lahoud
Chairman IMA Ohio
Council



John Iannarelli
Retired FBI
Special Agent



Kristi Stocker
Success Coach,
Speaker



Alan Mallory
Author, Speaker



Toby Rittner
President & CEO
of CDFA



February 27, 2026
8:00 AM - 5:00 PM

QUEST
CONFERENCE CENTER
Columbus, Ohio

REGISTER NOW



<https://bit.ly/3YqS7ar>



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in Business

OHIO REGIONAL COUNCIL

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

UPCOMING WEBINAR SCHEDULE

INSIDE TALK

Top 5 Priorities of Forward-Thinking CFOs

Wednesday, January 21, 2026, from 1:00 p.m. to 2:00 p.m. (EDT)

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

As businesses undergo digital transformation, the role of the CFO is shifting from steward to strategic partner, requiring CFOs to embrace new technologies and take the lead in guiding the process.

This webinar explores the top five priorities CFOs must adopt to drive sustainable, technology-enabled growth. From developing an AI strategy and enabling data-driven decision making to navigating global tax mandates and challenges in global trade, each priority underscores the importance of the CFO's influence in building the enterprise for the digital age. By attending this webinar, you will understand these priorities and how to leverage technology to stimulate finance transformation.

The 2026 Tax Horizon: Emerging Trends Every Business Should Watch

Wednesday, February 4, 2026, from 1:00 p.m. to 2:00 p.m. (EST)

Field of Study – Taxes– Digital Transformation & Innovation

As businesses prepare for the next wave of regulatory and compliance challenges, understanding how recent trends shape the future of indirect tax is essential. This session reviews the key themes that emerged in 2025 and examines how those patterns are influencing the policy landscape leading into 2026. We'll also explore significant federal and state tax cases and discuss their potential impact on corporate taxpayers in the years ahead. Whether your focus is strategy, compliance, or digital transformation, this webinar will provide the guidance needed to anticipate 2026 developments and position your organization for success.

Check out all IMA [Webinars Here](#)



ima26 Accounting & Finance Conference

featuring

THE CFO ALLIANCE®
experience

June 14 - 17, 2026 ✦ Tampa, FL

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