



The

August, 2022

# The Balance Sheet

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DAYTON CHAPTER

## *President's Message*

Summer seems to be quickly winding down, so I hope you have been out enjoying it! We enjoyed seeing some of our members at the Levitt Pavilion for our July social.

The chapter board is making good progress filling out our dinner meeting series with a variety of speakers and topics. Please save the date of Tuesday, September 20<sup>th</sup> for the first session. As we will continue with the third Tuesday of the month for most of our education sessions. If you have an idea for a topic or speaker that you would like to see presented, just contact us at [dayton@imachapter.org](mailto:dayton@imachapter.org).

Please check out the newsletter for the details on our annual subscription program, which are pleased to bring back for the convenience of our members. You can get a 10% discount with this program and the convenience of not having to register each month. We greatly appreciate the support from IMA which has allowed us to maintain our pricing from three years ago, despite all of the inflation.

Please check out the newsletter also for news on chapter member achievements and chapter awards. I hope to get back to recognizing all our new members and award winners more regularly.

*Paul Myers*

## **DAYTON IMA DINNER MEETINGS - LOOKING FOR A GOOD DEAL?**

We are reintroducing 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 \$200 if paid by September 21, 2022.  
It's a 10% discount!**

For those of you who prefer to make a reservation each month, the rates will continue to be \$32 if you make an advance reservation and \$35 without a reservation. Support from IMA is allowing us to retain these prices for now.

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](mailto:dayton@imachapter.org) now or when you register for the September meeting.



## DAYTON CHAPTER IMA AWARDS

We are pleased to share that thanks to the your participation as members and the efforts of the chapter board, the Dayton Chapter was recognized by IMA for it's performance during the fiscal year ending 6/30/2022.

The chapter received the following awards:



These awards were received in recognition of the quantity and variety of CPE offered during our monthly meeting series, as well as the social events we hosted virtually and in-person.



The chapter also received a Chapter of Excellence Award in recognition for all of the activities in combination, along with our efforts to share Diversity, Equity and Inclusion topics and leadership development.

The chapter would also like to give recognition to:

- **Weston Renner** – for achieving the CMA Certification
- **Amanda Bullock** – for achieving the CSCA Certification
- **Kim Cuesta and Richard Sirucek** – for achieving 25 years with IMA

We would also like to welcome our newest members:

Robert Lee  
Alex Berardi  
Amanda Belt  
Justin Grider  
Amy Beeson  
Cade Brubaker  
Nathaniel Cade  
Traci Kohlrieser

Meghan Ray  
Michael Waugh  
Jacob Wasley  
Megan Will  
Jennifer Bashore  
Justyn Bowman  
Holly Brunotte-Stewart  
Adam Manning

## UPCOMING WEBINARS

### LEADERSHIP ACADEMY

#### Successfully Managing Workplace Conflict

**Tuesday, September 13, 2022 from 1 p.m. to 2:30 p.m. (EDT)**

Field of Study – Personal Development; Domain – Leadership

Conflict is part of every workplace as it is just part of human nature. When it is done right, it can be a healthy part of a positive work experience. It is, after all, the way we make sense of competing ideas and diverse perspectives. It is how we discuss options and select the best answers. But often, conflict is not done right, leading to unhealthy and even toxic work environments. Conflict management is an essential leadership skill requiring a lot of different skills and involving several competencies.

This workshop will help define conflict and conflict management and how to approach both in a healthy way to lead to positive outcomes. The webinar will look at sources of workplace conflict, the five elements of every conflict, different approaches to conflict and when to use each, handling conflict across cultures, how a manager should handle conflict between team members, and specific strategies and techniques for managing conflict in the healthiest way possible. Ultimately, the goal of the course is to help you acquire the skills, techniques, and methods for successfully managing workplace conflict.

### INSIDE TALK

#### Unlock a New Profit Pool with B Corp Certification

**Friday, September 9, 2022 from 1 p.m. to 2:30 p.m. (EDT)**

Field of Study – Specialized Knowledge – Domain-Strategy, Planning and Performance

Join practitioners from the U.S., the U.K., and South Asia to discover the journey of B Corp certification and determine if it is the right investment to enhance your company's environmental, social, and governance (ESG) portfolio and unlock its new profit pool.

The presenters will explore how sustainability reporting will shift in 2023 and beyond. They will provide an overview on the B Corp certification global landscape and its impact on business's bottom line, highlight potential opportunities and challenges facing SMEs, and the need for government strategic policy.

#### How Automating Invoice Management Can Help Your Business Thrive

**Wednesday, September 14, 2022 from 1 p.m. to 2:00 p.m. (EDT)**

Field of Study – Information Technology – Strategy, Planning and Performance

Automating your company's AP processes can allow your accounting and finance team to focus on higher value work that makes an impact for your business. During this session, experts from SAP Concur will discuss some of the biggest hurdles faced by finance leaders today, and how employing automation is helping them persevere. They will also provide tips that you can use to improve AP processes and address economic, staffing, and business continuity challenges within your organization.

[http://www.imanet.org/learning\\_center/IMAWebinars.aspx](http://www.imanet.org/learning_center/IMAWebinars.aspx)

## CMA Part 1 Exam Preparation Deadline Approaching!

Time is running out to enroll in the [CMA Exam Prep Part 1: Financial Planning, Performance and Analytics](#) course being offered this Fall 100% Online at Villanova University!

Visit the [CMA webpage](#) for details and to enroll.

The deadline to enroll is **September 6th!**



## IMA President and CEO to Retire in Early 2023

**Montvale, N.J., August 29, 2022**—IMA® (Institute of Management Accountants) announced today that Jeff Thomson, CMA, CSCA, CAE, the organization's president and CEO, will retire in early 2023. Thomson's decision comes following an impressive, nearly 15-year tenure of leading the organization at a time of transformation and record growth. Under Thomson's leadership, IMA more than doubled its membership and the number of professionals holding the CMA® (Certified Management Accountant) certification, while expanding globally in reach, reputation, and relevance. Today, IMA serves about 140,000 members in 150 countries through 12 global offices, 350 chapters, and more than 200 staff.

"Jeff is commended for his leadership during a turnaround period, marked by a shift in IMA's strategic direction, a mission to strengthen the profession through certification and continuing education, and meeting the needs of professionals in emerging markets around the world," said Gwen van Berne, CMA, IMA Chair. "He has always been committed to telling the story of our proud profession, one where we make a difference for careers, organizations, and society at large."

Thomson joined IMA in 2005 as Vice President of Research, where he built IMA's research and thought leadership practice to ensure that the organization made meaningful contributions to the professional body of knowledge, more recently including emerging issues related to technology and data analytics; sustainable business management; and diversity, equity, and inclusion (DE&I). Thomson has authored numerous articles and a book, and provided testimony to the U.S. Congress in the areas of risk management, internal controls, and corporate governance. With a strong belief in partnerships, he personally represented IMA on the boards of numerous collaborative organizations, including COSO (Committee of Sponsoring Organizations of the Treadway Commission), IFAC (International Federation of Accountants), and IIRC (International Integrated Reporting Council).

Thomson has consistently been named in Accounting Today's "Top 100 Most Influential People List," has been honored with the Lifetime Achievement Award by Trust Across America, and was named among NJBIZ's Power 50 in Accounting list. Under his leadership, IMA also won numerous industry awards, including top workplace and professional body of the year.

You can read the rest of the article linking [HERE](#)