



The Association of
Accountants and
Financial Professionals
in Business

DAYTON CHAPTER



The

October, 2023

Balance Sheet

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DAYTON CHAPTER

Fall into to some good networking and CPE and join us 10/17/23!

FIRST SESSION SPEAKER

October 17, 2023

5:30 – 6:20 p.m.

Engineers Club

Michael Martens

Transamerica Financial Advisors, Inc.

Succession Planning



I grew up in a family business in Cleveland, Ohio. My Family owned 3 funeral homes in the Cleveland area. Having worked in the family business for several years, I was able to appreciate the struggles that family business owners experience.

I joined the Stouffer Hotel

Corporation in 1986, managing food operations in their hotel in Downtown Cleveland, Ohio. Over the next 10 years in the Hospitality Industry, I held several positions, from Food & Beverage Director to Hotel General Manager.

I was recruited by Sysco Corporation in 1996. For 9 years, I worked as a consultant and marketing manager, working with local restaurants to grow and develop their business. I worked with individual and multi-unit restaurants over a 3-county area. During that time, I was given the prestigious Torchbearers Award, as one of the Top Performing Marketing Associate in North America.

The skills and experience I gained in my Family business, and in hotel operations, and sales gave me a very diverse background. I wanted to help individual and families to plan for their financial future. Transamerica offered me a great opportunity to use the skills and knowledge that I acquired, to help people. I did not want my business owners to make the same mistakes that my Family made. Transamerica has given me the tools and resources to help develop an **Exit Strategy** for my business owners. **"Succession Planning"** is how I work with my family business owners to plan for today and their future.

SECOND SESSION SPEAKER

October 17, 2023

7:20 -8:10 p.m.

Engineers Club

Dan Douglas

Dayton Realtors

The Dayton Metro Housing Market



Dan Douglas is the Government Affairs Director for the Dayton Realtors. He leads the advocacy and local public policy efforts of the organization. Dan is a two-time graduate of Wright State University with a bachelor's degree in psychology and a Master's Degree in International and Comparative Politics.

He got his start in the political arena as a field representative and scheduler for Congressman Michael Turner. Dan and his wife, Devon, reside in Miamisburg Ohio where they plan an annual festival and community fundraiser in May called Spring Fest in the Burg.

The Dayton Realtors is a Trade Association for Real Estate Professionals with over 3,500 REALTOR members in the Miami Valley. Dayton REALTORS® serves its members as a resource for continuing education, a wide range of committee activities, the Multiple Listing Service, social events, products and publications.

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<https://daytonrealtors.org/housing-data/>

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



President's Message



Fall can be such a busy time, both at work and with our families and communities. It is a common season for budgets, or maybe physical inventory, dealing with tax filing extensions or trying to make the fourth quarter as successful as possible. We hope you will consider taking time to join our group for a couple of great speakers and networking amidst your workload and getting to the fall festivals and lovely fall hikes.

DINNER MEETING – We had a great crowd for our first meeting in September. For October, before dinner, we are pleased to welcome Michael Martens from **Transamerica Financial Planners, Inc.** I encourage you to check out his bio and learn why he is very qualified to speak on **Succession Planning**. After dinner, we'll get to hear from Dan Douglas from the **Dayton Realtors**. He will be letting us know the current state of the Dayton housing market and discuss the importance of adequate housing to employers and the economy.

FINAL REMINDER - STUDENT LEADERSHIP CONFERENCE SCHOLARSHIPS – Students and Academics – Please note that registration is open for the 2023 Conference that is in nearby Detroit, MI. Check out page 3 for details on scholarships.

We hope to see you at the meeting!

Paul Myers
Chapter President

Apply Now: DE&I Leadership Experience

IMA offers a unique opportunity for diverse professionals to join the [DE&I Leadership Experience](#). Participants collaborate with mentors, tackle DE&I challenges, and present projects to senior leaders.

Benefits include a free DE&I practices certificate, mentorship, and leadership recognition. If you or any underrepresented members of your chapter/council are interested, please submit materials by **October 31**. Selected participants will be notified by December 1. [Apply now!](#)

Join this First-of-its-Kind Workshop on Sustainability Reporting

IMA is proud to offer the [Bridging COSO and Sustainable Business Practices](#) workshop on **Nov. 30 – Dec. 1, 2023**, at Fordham University's Lincoln Center campus!

The demand for integrating sustainable business practices is increasing as government regulations continue to be rolled out. Recent requirement changes will have a tremendous impact throughout the supply chain.

This two-day workshop will empower you with the tools to drive sustainable business performance and avoid potential litigation. Need more development in this area?....You can't afford to miss this.

[Register now!](#)



24th ANNUAL STUDENT LEADERSHIP CONFERENCE

Calling all students who want to be future accounting leaders and CFOs! It's time to polish up your resume and kick your networking skills into high gear because IMA's most highly anticipated event for students and academics will be here before you know it.

Advancing your career starts with a single, purposeful step. Attending IMA's Annual Student Leadership Conference can help you begin or continue your journey by connecting you with industry professionals, students, professors, and more in a relaxed, collaborative environment.

Imagine new directions for your career path with IMA!

Conference highlights include:

- Dynamic Keynote and Concurrent Session Presentations by Industry Experts
- Pre-Conference Industry Tours -
- Networking Events and More!



Jump-start your journey from the classroom to the boardroom.

Students – check the box below on how to learn to apply for a grant to help you attend!

Registration is now open, so for more details, visit:

<https://www.imastudentconference.org/event/>

Thinking about the CMA Certification

[Find out more Here](#)

IMA CHAPTER MEMBERS
SAVE 25%
ON THE #1 MOST COMPREHENSIVE CMA REVIEW
SAVE NOW

STUDENT CONFERENCE **\$250 SCHOLARSHIP GRANTS** **AVAILABLE**

There are scholarship grants available for this year's STUDENT LEADERSHIP CONFERENCE from the Ohio Regional Council of IMA...**\$250 for students in the Dayton Chapter area.**

Ohio Region IMA students (including Indiana University East) who wish to apply for Council assistance will complete an application which will ask them why they want to attend the annual IMA Student Leadership Conference in Pittsburgh and ask them to describe their current and/or expected involvement in IMA.

Link here to learn the full details

<https://ohio.imanet.org/students/slc-grant> . The link to the application is at the bottom of the page.

If you are having any difficulties with the Council website, so please reach out to Paul Myers in the meantime at dayton@imachapter.org .

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

IMA Women's Leadership Summit - Virtual



The Association of
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IMA Women's Leadership Summit

Virtual
October 13, 2023



Are you ready to empower yourself and embrace your leadership potential? The clock is ticking, and this is your **LAST CHANCE** to join the [IMA Women's Leadership Summit!](#)

When: October 13, 2023, 10:00 a.m. – 3:30 p.m. ET
Where: Virtual via Zoom
Pricing: \$50 for IMA members, \$100 for nonmembers
CPE: Up to 5 ICMA CPE credits

This summit will equip you with the tools, insights, and connections you need to thrive in today's dynamic business landscape. From ChatGPT to ESG to soft skill topics, we have you covered!

This is your final reminder to sign up to participate in this highly engaging educational event. Propel your career to new heights and contribute to building a better, more equitable future for all. [Register now](#) before it's too late!

Gain *insight* and
expertise with
IMA CPE courses



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

UPCOMING WEBINAR SCHEDULE

INSIDE TALK

Revenue Recognition Automation for Complex Use Cases and Scale

Wednesday, October 25, 2023 from 1:00 p.m. to 2:00 p.m. (EDT)

Field of Study – Information Technology – Technology & Analytics

According to Zuora's latest survey, 74% of revenue accounting teams perform manual interventions daily to process transactions. These teams typically rely on a combination of spreadsheets and native Enterprise Resource Planning (ERP) capabilities for revenue recognition, which results in never-ending customizations, elevated control risks, and increased audit and headcount costs.

This is why more revenue teams now turn to revenue subledgers that work alongside their ERP to support complex use cases and scale. In this webinar, Zuora and Ernst & Young experts will explore best practices for automating complex rev rec use cases, including the key differences between ERP native capabilities and revenue subledgers, vendor selection methodology, and common implementation pitfalls.

Understanding AI for Finance Professionals

Wednesday, November 1, 2023 from 1:00 p.m. to 2:00 p.m. (EDT)

Field of Study – Information Technology – Technology & Analytics

Join Tim Caudill and Taylor Jackson from Jedox as they discuss the evolution of AI and its influence on CFO functions. You will hear about various AI technologies in play today and discover real-world examples of how AI is enhancing the finance function. Additionally, you will learn about the key benefits of incorporating AI into your organization.

LEADERSHIP

Beyond the Basics: Pro Tips for Your Job Search

Monday, October 30, 2023, from 1 p.m. to 2:00 p.m. (EDT)

Field of Study – Personal Development – Leadership

Competition for skilled talent persists. Even as some employers become more strategic about hiring, job openings sit near record highs and the need to stand out among fellow job applicants is more important than ever. Join Ai Ling Lee and Linda Muneka, vice presidents at Robert Half, as they discuss pro tips for job applications, interviews, and your first 90 days on the job, as well as how to maximize generative AI throughout this process.

Revealing the Leader Within

Tuesday, November 7, 2023, from 1 p.m. to 2:30 p.m. (EDT)

Field of Study – Personal Development – Leadership

This webinar will help to uncover the relationship between your distinctive personality traits and your leadership capabilities. Join Rick Thompson as he examines the multifaceted world of personality and its connection to impactful leadership. This session will help you to identify and clarify your core values and life goals, uncover ways to establish boundaries, and develop strategies for replenishing your mind and body—all to support you in being your own unique leader..

Check out all IMA [Webinars Here](#)