

North Penn Chapter

2017-2018 Roster Book



2017—2018 North Penn Chapter Year at a Glance

September 2017

- CMA Testing month
- Dinner Meeting 9/19/17

October 2017

- CMA Testing month
- Ethics Breakfast 10/4/17
- Dinner Meeting 10/17/17 (Crossed Quills night)

November 2017

- Student Conference https://www.imastudentconference.org/
- Dinner Meeting 11/21/17

December 2017

• Dinner Meeting - 12/5/17 (Guest / spouses night)

January 2018

- CMA Testing month
- Dinner Meeting 1/16/18

February 2018

- CMA Testing month
- Dinner Meeting 2/20/18

March 2018

• Dinner Meeting - 3/20/18

April 2018

• Dinner Meeting - 4/17/18 (Student night)

May 2018

- CMA Testing month
- Dinner Meeting 5/15/18

June 2018

- CMA Testing month
- Annual Conference https://imaconference.org/

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The Association of Accountants and Financial Professionals in Business

Vision Statement

To be the resource for developing, certifying, connecting, and supporting the world's best accountants and financial professionals within businesses.

Statement of Mission

To provide a forum for research, practice development, education, knowledge sharing, and the advocacy of the highest ethical and best business practices in management accounting and finance.

Global Core Values

- Respect for the Individual
- Passion for Serving Members
- Highest Standards of Integrity and Trust
- Innovation and Continuous Improvement
- Teaming to Achieve

President's Message

Dear Fellow Members,

I'm very excited to serve as your North Penn Chapter IMA President for the 2017/2018 year. A big thank you to Immediate Past President Kathy Weaver for her leadership and contributions along with the 2016/2017 board members.

The board is hard at work developing opportunities in support of the Institute of Management Accountants' mission to provide a forum for research, practice development, education, knowledge sharing, and advocacy of the highest ethical and best business practices in management accounting and finance. We offer nine dinner meetings from September to May plus an ethics breakfast



delivering NASBA approved credits. Our meetings also offer a great opportunity for networking. Visit our website at northpenn.imanet.org/ for more information.

IMA's Global Salary Survey was released in March, again revealing that CMAs have greater earning power: 45% more in median salary and 50% more in median total compensation than non-CMAs. For those members who already have a CMA certification, the IMA has announced a new specialty credential. The CSCATM (Certified in Strategy and Competitive Analysis) certification is designed to reinforce the CMA by enhancing expertise in strategic planning, competitive analysis, and decision making. Visit the IMA website at www.imanet.org for details.

We are excited to welcome the new board members of our Student Chapter at Temple which is going through a significant change as they focus on the importance of what IMA represents. This upcoming academic year they are promoting the CMA certification heavily to members, bringing in guest speakers to talk about the benefits as well as how to obtain and study for the test. Also, they are straying away from public accounting and focusing strictly on educating members about industry and corporate accounting and the various careers associated with accounting/finance. Please join me in welcoming:

President: Pieter Cos, pieter.cos@temple.edu

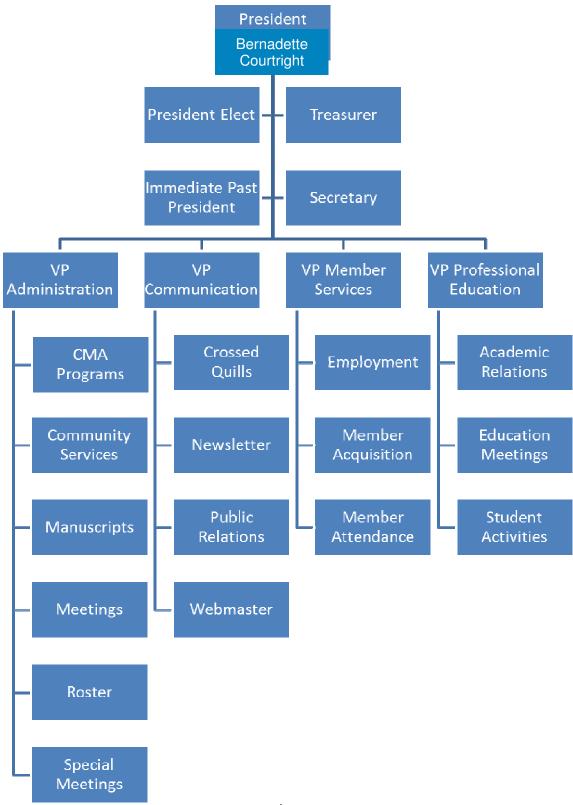
Vice-President: Andrew Narducci, <u>anarducci@temple.edu</u> Treasurer: Massah Kachlan, <u>massah.kachlan@temple.edu</u> Secretary: Mariah Tulaney, <u>mariah.tulaney@temple.edu</u>

I encourage you to reach out and introduce yourself and connect on LinkedIn.

I'm looking forward to a year of meeting new people, seeing fresh faces in the IMA, and promoting management accounting. The IMA truly is a great organization and venue for accounting professionals, and my goal is to share that message with everyone I meet.

Best Regards, Bernadette

North Penn Chapter 2017—2018 Board Members Overview



PresidentBernadette Courtright

bcourtright@comcast.net VP Member Services (2015-17)



George Bancroft, Jr.

VP Administration Co-Director of Educational Meetings gb0248@yahoo.com

VP Administration (2011-17) VP Professional Education (2013-15) Director of Academic Relations (2008-11) Co-Director of Educational Meetings (2015-17)

Steven Crowell, CMA

Webmaster
scrowell@presidio.com
Webmaster (2009-17)
VP Communications (1992-94)
Director at Large (1994-96)
Director of Member Acquisition (1991-92)
Director of Roster (1990-91)





Ted Fitzer

Director of Member Attendance tyajfitzer@aol.com Director of Employment (2007-10) Director of Member Attendance (2007-17)



Karen L. Jett, CMA

Director of Roster
Director of Crossed Quills
kjett@redknight.com
Chair Elect (2008-09)
President (2007-08)
President Elect (2006-07)
Director of Roster (2008-17)
Director of Crossed Quills (2013-17)
Vice President, Membership (2005-06)
Director, Member Acquisition (1996-97)

Gregory Landes, CMA

VP Communications Newsletter

gklandes532@gmail.com Chair Elect (2016-17)

President (2015-16)
President Elect (2014-15)
Vice President, Communications (2016-17)
Director of Community Service (2013-15)

Director of Public Relations (2013-15)





William Lauzus, Jr., CMA, CFM

Treasurer

blauzus@gmail.com

Chair Elect (2007-08) President (2006-07) President Elect (2005-06)

Treasurer (2005-06, 2007-17) Vice President of Professional Education (2001-03)

Director, Educational Meetings (1999-03)

Director, Community Service (1997-99)

Director, Meetings (1996-97)

Director, CMA Programs (1995-96)

Director, Employment (1993-95)

Secretary (1988-89)

Director, Special Activities (1987-88)

Julie Lengele Director, Manuscripts

President (2012-13)
Chair Elect (2013-14)
Director of Meetings (2009-12)
Director, McNeil/IMA Luncheon (1999-07)
Director, Manuscripts (2001-12, 2013-17)
Director of Special Activities (2001-02)
Director, Member Retention (2000-01)



Patrick Luddy, CPA VP, Membership

pluddy@gatewaysearch.com
President (2003-04)
President Elect (2002-03)
Vice President of Membership (2000-03)
Director, Member Acquisition (1998-2003, 2006-12)
Director, Academic Relations (2011-17)
Director, Student Activities (2011-17)

Director, Student Affairs (2000-01)



Paul Lusch Director of Community Service plusch@uwgpsnj.org Director, Community Services (2012-13, 2015-17)



William Martin, CPA Co-Director of Educational Meetings

wmgarrettmartin@gmail.com
President (1993-94)
President Elect (1992-93)
VP Professional Education (1992-93, 2013-14)
Co-Director of Educational Meetings (2014-17)
Director, Educational Seminars (1991-92)
Director, Community Services (2000-2012)

Beth Mueller, CPA

Director of Meetings Director of Manuscripts

bmueller@thelincolncenter.org

President (2011-12) Chair Elect (2012-13) Secretary (2009-11)

Director of Member Attendance (2008-09) Director of Retention and Membership (2006-08)

Director of Educational Seminars (2000-03)

Director of Meetings (2012-17) Director of Manuscripts (2016-17)





Philip Roth, CMA
Director of CMA Programs
roth@bergeys.com
Director of CMA Programs (2009-17)

Holly Sharp Secretary hmsharp13@gmail.com Secretary (2016-17)





W. Allen Sullivan, CPA

Director of Special Meetings

wascpa@aol.com

President (2013-14)

Chair Elect (2014-15)

President Elect (2012-13)

VP Professional Education (2014-16)

Director of Public Relations (2009-13)

Director of Newsletter (1973-74)

Director of Special Meetings (2016-17)



Kathy Weaver, CMA
Immediate Past President
Director of Academic Relations
Director of Student Activities
kjwcma24@gmail.com
President (2016-17)
Secretary (2013-16)

The North Penn Chapter of the Institute of Management Accountants: Chapter History

Until 1957, the Philadelphia Chapter was the only local chapter of what is now the Institute of Management Accountants. On July 8, 1957 Charles Zinger chaired an organizational meeting to establish new chapters. One of these new chapters was named North Penn, after the North Pennsylvania Railroad Company (founded 1852) which linked Philadelphia and Bethlehem. North Penn began operations on November 1, 1957 with 145 charter members. The chapter grew steadily, attracting 418 members by 1969. During 1969, North Penn started the Valley Forge Chapter. Following the Valley Forge spin-off, North Penn continued to prosper and now boasts approximately 200 members.



Karen Jett, Fred Schea
and Stephen Shepard
of the
Institute of
Management
Accountants at the
50th Anniversary
Celebration

Since its inception, North Penn has been a full service chapter, meeting the needs of both its members and the accounting profession through education, research, publications, and fellowship. Some of the chapter's accomplishments include:

- The North Penn IMA Chapter Scholarship is offered annually.
- Co-sponsorship of the CMA Learning System with Villanova. (http://www.villanova.edu/vpaa/continuingstudies/programs/certificates/cma.htm)
- Updated monthly newsletter named *The Journal* (previously the *North Penn Express*).
- Networking opportunities including joint meetings and business card exchange.
- Community service such as the annual holiday food drive.
- CPE credits on current business topics.
- Affiliated with Gwynedd-Mercy Student chapter in 2011

Chapter History (Continued)

North Penn has earned seven banners in the national competition:

- 10th place in 1978 under the leadership of Douglas A. Volk
- 3rd place in 1980 under the administration of William W. Murphy
- 8th place in 1995 under the direction of Frank J. Gallo
- 18th place in 1997 under the leadership of Lisa J. Cruikshank
- 24th place in 1998 under the direction of Rosemarie Hardy
- 10th place in 2001 under the leadership of Maxine Romano
- 20th place in 2006 under the direction of Scotti Sawyer-Kershner.



2006 Banner
Present in photo (left to right):
Clair Raubenstine - chapter
member and past
national president
Carl Smith - national chair
Karen Jett - chapter member
?
Bill Brower - chapter member
and outgoing national
chair
Jim Romesberg - MAC delegate
Bill Martin - chapter member and
MAC delegate

The Chapter has gained recognition in other areas. In 2008 we were honored for Member Retention and our Website at http://northpenn.imanet.org/index.htm. In 2009 we received an honorable mention for public relations.

Chapter member and National Chair Fred Schea presents public relations honorable mention to chapter member and Regional Council VP Bill Martin on June 9, 2009



North Penn was instrumental in the founding of the Mid-Atlantic Council in 1975.

Chapter History (Continued)



Fred Schea—IMA Chair 2008-2009

The chapter is proud to have had one of its members, Clair M. Raubenstine, serve as National President during 1996-97. Chapter member, William L. Brower, Jr., served as Chair 2006-2007; Fred Schea served as Chair 2008-2009. North Penn members continue to furnish leadership to both the national organization and to the Mid-Atlantic Council (MAC).

(Note for a list of members that have served at the council and national level see pages 22 & 23.)

The North Penn Chapter takes great pride in honoring those members who have contributed so much to the chapter's success over the years which is why we were inspired to celebrate our 50th Anniversary in October 2008 at the Old York Road Country Club.



Dancing at the 50th Anniversary at the Old York Road Country Club in October 2008.

The North Penn Chapter was approached by the Business Club of Gwynedd-Mercy College in August 2011 to affiliate with our chapter and establish a student chapter at the college. On October 18, 2011, two students from GMC, Daniel Ressler (Business Club President-Elect and Student Chapter President) and Jeff Riling (Business Club Treasurer) presented the school's petition to the chapter board. The board unanimously approved the motion to create the student chapter.

Chapter History (Continued)



President Beth Mueller and Past-President Ken West present the student charter to Richard Karuschkat and Daniel Ressler.

On December 6, 2011, the Gwynedd-Mercy College student charter was presented by President Beth Mueller to Richard Karuschkat (Business Club President) and Daniel Ressler. Also in attendance were Alexis Bohr (Business Club Secretary), Jeff Riling and Jess Lloyd (Senior Accounting Major).

The School of Business strongly supports this joint endeavor and is backed by Dean Heather Pfleger and Professor Carlo Silvesti. Dr. Robert Funk, Acting VP of Academic Affairs and Anthony Stipa, Communications Specialist were included in the evening activities.

On April 16, 2013, the Gwynedd-Mercy College student chapter presented their first dinner meeting program to the North Penn Chapter. Working with their advisor, Carlo Silvesti, CPA, two student chapter members (Nick Riccione and Jonathan Meley) organized a panel on Networking. The meeting was a great success, drawing a large number of students and chapter members.

On December 2, 2014 the chapter held the first silent / Chinese auction. The effort was spearheaded by President, Jan Spiegel and raised \$629 for the scholarship. The auction was popular and successful.



In 2015, the Temple University student chapter affiliated with the North Penn Chapter. Their goal in joining with our chapter was to increase opportunities for student involvement and attendance at our meetings. We welcomed those students to our monthly meetings and enjoyed getting to know them better.

On Thursday, October 20, 2016 the North Penn Chapter co-hosted a card exchange with the Penn Suburban Chamber of Commerce. Held at the newly renovated Lansdale Borough Office it was a great chance for our chapter to talk about the benefits of membership and attending our monthly dinner meetings.

Guests and members are always welcomed at chapter events. For more information please contact Kathy Weaver at kjwcma24@gmail.com.

Monthly Meeting Schedule

Technical Dinner Meetings: Dinner meetings are held at the William Penn Inn, Rte. 202 & Sumneytown Pike, Upper Gwynedd, PA, http://www.williampenninn.com/

Fellowship begins at 5:30 PM and dinner is served at 6:30 PM. Technical Seminar begins at 7:15 PM. Please make your reservation by Monday, 11 am prior to the meeting. The meal cost with reservations is \$30 and without is \$32. Student meals are \$17 with reservations. Non-member cost is \$32. You may rsvp by:

- Calling our 24-hour number, (215)273-4998
- Emailing northpennima@yahoo.com
- Visiting http://www.northpenn.imanet.org/htmls/meetings.htm (Note: You may also pay by credit card here)

card fiere)	
September 19, 2017	Meeting Information How to Manage Payment Collection Today Mary Ann Robinson, Trans ACT
October 17, 2017	Sales and Use Tax Mike Espenshade, Tax Matrix
November 2, 2017	Ethics Breakfast Meeting (2 cpe) To be Determined
November 21, 2017	Changes to Reporting for Non-Profits Cynthia Bergvall, Bee Bergvall & Co. <i>Food Drive</i>
December 5, 2017	To be Determined Friends and Family Night
January 16, 2018	Economic Update Kip Schaefer, Bernstein
February 20, 2018	To be Determined Student Night
March 20, 2018	Mentoring Lisa Penn, SEI Wealth Platform & Operations Food Drive
April 17, 2018	To be Determined
May 15, 2018	To be Determined

Your Obligations as a Member

- 1. To attend meetings, if at all possible. If you cannot attend the dinner, attend the technical session.
- 2. To participate in the discussion at meetings.
- 3. To offer constructive suggestions to make Chapter meetings more beneficial and attractive to the membership.
- 4. To get acquainted with your fellow members, exchange ideas and discuss mutual problems.
- 5. To interest others within your company in the activities of the chapter and to bring them to the Chapter meetings.

Member Services

Chapter Newsletter

The Journal, the Chapter's monthly publication, is a valuable means of communication between headquarters, your officers and directors, and the general membership. The success of the publication depends on the information made available to the Editor by the membership. We earnestly solicit your assistance in providing news items about yourself, your business, the accounting profession, or any other information of interest or to help your fellow members of the North Penn Chapter.

THE JOURNAL

Publication of the North Penn Chapter of the Institute of Management Accountants

This is YOUR publication. Please support it by sending your contributions to the Editor.

Community Programs

The Chapter has the opportunity to make tangible contributions to our community through the direct and indirect involvement of our member. The chapter may elect to take up food drives and solicit donations for local food banks. The chapter may offer opportunities for members to become directly involved in aiding small business through free accounting and management advisory services and training.

Paul Lusch, plusch@uwgpsnj.org



Member Services (Continued)

North Penn Chapter Scholarship

The North Penn Chapter of the Institute of Management Accountants offers a local college student a \$500 Scholarship Award. The Scholarship award is provided to a student studying accounting and based on their response to an application including a one page essay explaining the student's reasons for pursuing a career in Accounting. A faculty reference is also required. The award will be presented during the Student Night Dinner Meeting of the chapter (April).

Accounting students from three local colleges – Gwynedd-Mercy, Temple (Ambler Campus), and Ursinus – are eligible to submit an application which will be reviewed by a committee of the chapter board for final selection. The student selected as the winner will be awarded the \$500 Scholarship to apply to their college expenses and a paid one year membership to the IMA. A runner up from each of the other two colleges will also receive a paid one year membership to the IMA and a free North Penn Chapter dinner meeting.

Scholarship applications will be made available during December and are due by February 1. Interested students or faculty should contact:

Julie Lengele,

Or Beth Mueller, bmueller@thelincolncenter.org



2014 Scholarship Award Winner: Julia Domanico pictured with Carlo Silvestri, Jan Spiegel, and John Schlechter

North Penn Chapter Scholarship Winners

2016-17 Nick Sowden

Gwynedd Mercy University

Student Chapters

Gwynedd Mercy College Established and Affiliated 2011



On December 6, 2011, the Gwynedd-Mercy College student charter was presented by President Beth Mueller to Richard Karuschkat (Business Club President) and Daniel Ressler. Also in attendance were Alexis Bohr (Business Club Secretary), Jeff Riling and Jess Lloyd (Senior Accounting Major).

Temple University Affiliated 2015

In 2015, the Temple University student chapter affiliated with the North Penn Chapter. Their goal in joining with our chapter was to increase opportunities for student involvement and attendance at our meetings. We welcomed those students to our monthly meetings and enjoyed getting to know them better.



Temple University IMA-T chapter officers. Pieter Cos is President.

North Penn Chapter—100% Club

Perfect Attendance at Technical Meetings

15+ Years

Steven R. Crowell, CMA (17 years) Carol Anne Kline (26 years)

11 to 14 Years

Joseph Danko (14 years) William G. Martin, CPA (12 years)

6 to 10 Years

John C. Fusco, Jr., CPA (6 years)
Frank J. Gallo (10 years)
Neal Greenberg (7 years)
Robert P. Johnston, Jr., CPA (7 years)
Robert O. Jones (6 years)
William H. Lauzus, Jr., CMA, CFM (10 years)
William W. Murphy (8 years)
Clair M. Raubenstine, CMA, CFM, CPA (7 years)
Philip M. Santangelo (6 years)
John W. Wright (9 years)

5 Years

Charles H. McGlynn Frederick L. Root, CMA, CPA Frederick E. Schea, CMA, CFM, CPA Duane G. Sonneborn, Jr.

North Penn Chapter—100% Club

Perfect Attendance at Technical Meetings

4 Years

George D. Bancroft, Jr.
Rosemarie Hardy
Michele V. Kraynak, CMA
Karen L. Jett, CMA
Fred M. Kaplan
Maxine G. Romano
Kathy Weaver, CMA

3 Years

George W. Johannsen Richard J. Malak Lenora L. Perlmutter Kathryn A. Sherman Albert J. Stein Janis C. Wozar

2 Years

Wallace H. Bieler Nelson Calhoun, Jr. Monica DeCaro, CMA Suzanne M. Fleischmann Anne E. Gabel Scott Jacoby, CMA William H. Lundquist, CPA Brenda McCoach Abram L. Moyer Harry W. Parke, Jr., CMA Philip J. Rush, CMA, CFM John Schlechter, Jr., CPA Jan S. Spiegel W. Allen Sullivan, CPA Willis W. Warfel, Jr., CPA Brandon Weinstock, CPA Kenneth West, Jr.

1 Year Robin E. Adair Lenard Adam Michael J. Cull, CPA Robert C. Faix, CMA, CPA Theodore Fitzer Thomas P. Ford, CMA Lester E. Gallagher, III Barry M. Halterman, CMA, CFM P. Scott Heckler, CPA Robert P. Johnston, Jr., CPA Earl W. Kimmel, CPA Robert S. Kloss, CMA, CPA Kimberly A. Koch, CMA, CFM Raymond D. Langton, II Patrick F. Luddy, CPA George Maniatty Beth Mueller, CPA Robert Qualls Robert J. Riffert Maryanne Rosner, CMA Philip M. Roth, CMA Elena Samoila Holly Sharp R. Alan Smith

Marshal Tolins

Emmeritus Life Associates and Retired Members

Mr. Claude L. Anderson Mr William G. Martin, CPA

Mr. Thomas J. Balutis, CMA Mr. Philip A. McLaughlin, CPA

Robert L. Borders Donald F. Mills

Mr. John G. Cloud Mr Kenneth O. Roberts, CPA

J A. Corr Philip M. Santangelo

Mr. Paul J Corr, CPA George A. Shenkle

Mr Joseph Danko Mr. Charles W. Siegmann Jr

Mr. William J Drake Carl B. Smith
Mr Richard K. Garrison, CMA R Alan Smith

Mr. Robert J Hall Mr. Duane G Sonneborn Jr

Mr. Albert B. Holcombe, CPA
Paul L. Tiers
Mr. Fred Hupp Jr, CPA
Herbert E. Todd

Robert O. Jones Henry A. Underhill

Mr. Robert E. Wisniewski, CPA

Mr William H Lundquist, CMA, CPA Mr Robert N. Young, CPA Mr. Frank N Malkoch

Twenty-Fiver Club

The "IMA Twenty-Fiver Club" has been established to recognize the members who have not retired and are not ready to do so, and are loyal and faithful members for 25 or more continuous years.

Mr. Claude L. Anderson Mr William H. Lauzus, CMA, CFM Mr. Lloyd C Beck Jr Mr. Bruce A. Leauby, CMA, CPA

Mr Mark L. Bernhauser, CMA, CFM Mr Paul E. Loux, CMA

Robert L. Borders Mr William H Lundquist, CMA, CPA

Mr Charles R. Bowers, CMA, CPA Mr. Frank N Malkoch

Mr. William L Brower Jr, CMA, CFM Mr Bruce M. Margavitch, CMA, CFM, CPA

Mr. John G. Cloud Mr William G. Martin, CPA
J A. Corr Mr. Philip A. McLaughlin, CPA

Mr. Paul J Corr, CPA
Donald F. Mills
Mr Steven R. Crowell, CMA
William F. Novak
Ms. Lisa J. Cruikshank, CMA, CFM
Lenora L. Perlmutter
Mrs. Meg E. Cunnane, CMA, CPIM
Joseph B. Pinder

Mr. Clair M Raubenstine, CMA, CFM, CPA

Mr Joseph Danko Mr Kenneth O. Roberts, CPA

Mr. William J Drake Ms Maxine G Romano

Mr Jeffrey E. Fasick, CPA Mr Frederick L. Root, CMA, CPA

Mr. Theodore R Fitzer Mr Philip M. Roth, CMA

Mr Keith T. Foy, CMA Mr Philip J. Rush, CMA, CFM

Mr Richard K. Garrison, CMA Philip M. Santangelo

Neal Greenberg Mr. Frederick A Scenna, CMA, EA
Mr. Robert J Hall Mr. Frederick E Schea, CMA, CFM, CPA

Mr Barry M. Halteman, CMA, CFM Mr John F. Schlechter, CPA

Stephen J. Haraschak George A. Shenkle

Ms Alma A. Hazboun Mr. Charles W. Siegmann Jr

Mr P. Scott Heckler, CPA

Carl B. Smith

Mr Albert B. Holcombe, CPA

R Alan Smith

Mrs Melissa L. Horton, CMA, CPA Mr. Duane G Sonneborn Jr

Mr. Fred Hupp Jr, CPA Michael L. Terrell
Mr G. Scott Jacoby, CMA Paul L. Tiers
Robert O. Jones Herbert E. Todd

Mr. Ronald A. Kapusta, CMA, CFM Henry A. Underhill

Mr. Robert E. Wisniewski, CPA
Ms. Kimberly A. Koch, CMA, CFM
Ms. Michele V. Kraynak, CMA
Ms. Diana M. Zaffarano

Order of Crossed Quills

The "Order of Crossed Quills" is presented to those members making significant contributions towards the growth and improvement of IMA and the North Penn Chapter. A maximum of nine awards (for period of September to May) are presented each year.

The "Order of Crossed Quills" is awarded using two methodologies. Five award winners will be determined based on a point basis system as shown below. Up to four additional award winners will be identified based on a nominations committee made up of three to five past-presidents who are active in the chapter.

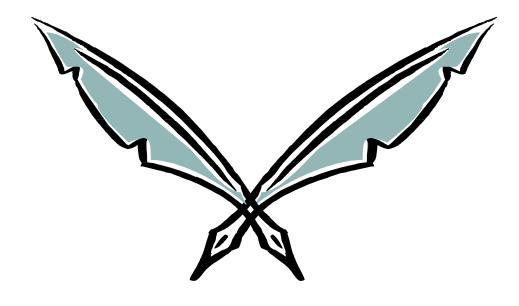
The active past-presidents will review the participation by our members and recommend up to four additional award winners. Activities and behaviors to be considered when making recommendations include:

- Significant contributions to the Chapter
- Performing in an outstanding way to better the Chapter
- Proactive involvement in IMA related outreach to other groups and / or students
- Achievements in other IMA areas such as at the Council and National levels
- Attracting new members or creating a buzz about the IMA, CMA, and / or the Chapter

The award winners will be honored at the October dinner meeting each year. Only one award is made to any one member during the award year.

Those areas qualifying for points as measures of the members' activity are as follows:

- Board participation1 point



Order of Crossed Quills

Ambassador Club

William H. Lauzus, Jr, CMA, CFM – 9th Award Steven R. Crowell, CMA-5th Award John C. Fusco, Jr., CPA – 10th Award William L. Lundquist, CPA -11th Award Frank J. Gallo – 10th Award William G. Martin, CPA – 16th Award Neal Greenberg – 5th Award William W. Murphy – 6th Award Robert J. Hall – 6th Award Charles Oettle – 4th Award Lenora L. Perlmutter – 5th Award Rosemarie Hardy – 5th Award Robert A. Harner – 6th Award Clair M. Raubenstine, CMA, CFM, CPA – 8th Award Herbert B. Hunsberger – 4th Award Frederick L. Root, CMA, CPA – 5th Award Karen L. Jett, CMA – 4th Award John J. Sabacus -6th Award Robert P. Johnston, CPA – 7th Award Philip M. Santangelo – 5th Award Carin L. Kajari – 5th Award Frederick E. Schea, CMA, CFM, CPA – 16th Award Douglas A. Volk – 5th Award Fred M. Kaplan – 4th Award Carol Ann Kline – 19th Award Brandon S. Weinstock, CPA – 5th Award

Three Time Winners

Peter M. Cusate W. Allen Sullivan, CPA
Gregory K. Landes, CMA Kathy Weaver, CMA
Maxine G. Romano Charles V. Wieand

Two Time Winners

George D. Bancroft, Jr. Abram L. Moyer Wallace H. Bieler Edward J. Myers Samuel A. Caterfino William F. Novak Lisa J. Cruikshank, CMA, CFM Kathryn A. Sherman Joseph Danko R. Allan Smith Lester E. Gallagher, III Jan E. Spiegel James P. Hayes Eric J. Steelman, CMA, CPA Scott Jacoby, CMA Albert Stoudt George W. Johannsen Willis J. Warfel, Jr, CPA Charles H. McGlynn

One Time Winners

Gregory Blakey Robert S. Kloss, CMA, CPA Paul Bunting Julie Lengele Katherine A. Burkhauser Patrick F. Luddy, CPA Joseph M. Choclos Rudolf A. Lutterschmidt, CMA John G. Cloud Beth Mueller, CPA R. Thom Cottrill Harry W. Parke, Jr., CMA William F. Courtney Robert J. Riffert Bernadette M. Courtright, CMA Philip M. Roth, CMA Monica DeCaro, CMA Philip J. Rush, CMA, CFM Robert C. Faix, CMA, CPA John F. Schlechter, CPA Thomas P. Ford, CMA Kimberly A. Schrantz Anne E. Gabel Duane G. Sonneborn, Jr. Robert D. Hoover Kenneth S. Stauffer, CPA Scott Jacoby, CMA Kenneth E. West Robert O. Jones

North Penn Chapter Past Presidents

7					
Kathy Weaver, CMA		2016-17	Charles H. McGlynn		1986-87
Gregory Landes, CMA		2015-16	Samuel A. Caterfino		1985-86
Jan E. Spiegel		2014-15	Peter M. Cusate		1984-85
W. Allen Sullivan, CPA		2013-14	William G. Fletcher		1983-84
Julie Lengele		2012-13	Carol Anne Kline		1982-83
Beth Mueller, CPA		2011-12	R. Thom Cottril		1981-82
Kenneth West, Jr.		2010-11	Philip M. Santangelo		1980-81
John F. Schlechter, Jr., CPA		2009-10	William W. Murphy	(3rd Place Banner)	1979-80
Monica DeCaro, CMA		2008-09	Charles D. Oettle		1978-79
Karen L. Jett, CMA		2007-08	Douglas A. Volk	(10th Place Banner)	1977-78
William Lauzus, CMA, CFM		2006-07	George W. Lewis		1976-77
Scotti Sawyer-Kershner	(20th Place Banner)	2005-06	Willis W. Warfel, JR CPA		1975-76
Paul Bunting		2004-05	Clair Raubentstine, CMA, CPA, CFM		1974-75
Patrick Luddy, CPA		2003-04	R. Alan Smith		1973-74
Lenora Perlmutter		2002-03	David G. Hunt		1972-73
Fred M. Kaplan		2001-02	<mark>John J</mark> . Subacus		1970-71
Maxine G. Romano, CPA	(10th Place Banner)	2000-01	George A. Shenkle		1969-70
Brandon S. Weinstock,		1999-00	F. B. Thomas, III		1968-69
Rosemarie Hardy		1998-99	Philip A. McLaughin		1967-68
Duane G. Sonneborn, Jr,		1997-98	Nicholas M. Fozzini		1966-67
Lisa J. Cruikshank, CMA, CFM	(18th Place Banner)	1996-97	Nicholas A. Lennuti		1965-66
Fredrick L. Root, CMA, CPA		1995-96	Edward J. Meyers		1964-65
Frank J. Gallo, PA, MBA	(8th Place Banner)	1994-95	William H. Lundquist, CMA, CPA		1963-64
William G. Martin, CPA, CIA		1993-94	Edward P. Moxey, III		1962-63
Michele V. Kraynak, CMA		1992-93	Joseph A. Ferry		1961-62
John C. Fusco, Jr, CPA		1991-92	Carl B. Smith		1960-61
Frederick E. Schea CMA, CFM, CPA		1990-91	George L. Gless		1959-60
John W. Wright		1989-90	C. Blair Keller		1958-59
Lester E. Gallagher, III		1988-89	Charles R. Zinger		1957-58
Wallace H. Beiler		1987-88			

Former Presidents-Other Chapters

Neal Greenberg

Philadelphia

1985-86

North Penn Chapter 2017-2018 Committees

Crossed Quills Committee

To Be Determined

Nominating Committee

Bernadette Courtright Kathy Weaver, CMA

North Penn Chapter Scholarship Committee

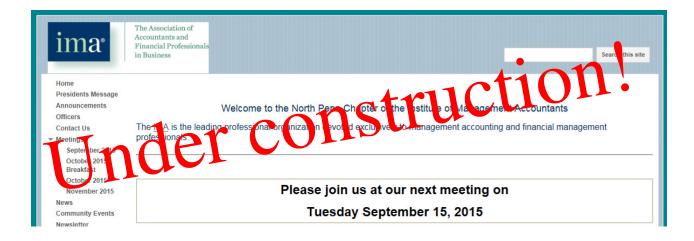
Julie Lengele Beth Mueller

The North Penn Chapter Website

The North Penn IMA website at http://northpenn.imanet.org/ has all the latest chapter information.

In late 2017, we are scheduled to have a major update to the chapter website with a completely new look and lots of relevant information. Be sure to check it out after it launches.

In addition, feel free to email us at northpennima@yahoo.com.



IMA Mid-Atlantic Council

The North Penn Chapter is a member of the Mid-Atlantic Council. For more information visit: http://www.midatlantic.imanet.org/.

The following North Penn Chapter Members hold or have held the following positions on the Mid-Atlantic Council:

Wallace H. Bieler Past President (1992-93)

Neal Greenberg Past President (1993-94)

Michele Kraynak, CMA Past President (2000-01), Ethics (2015-16), Student

Conference Committee Chair (2011-15),

Student Development (2010-11)

William G. Martin, CPA Past President (2003-04)

Beth Mueller, CPA Treasurer (2013-17)

William J. Murphy Past President (1983-84)

Clair Raubenstine, CMA, CFM, Past President (1975-76)

CPA

Frederick E. Schea, CMA, Past President (2002-03)

CFM, CPA

John Schlechter, Jr., CPA Secretary (2010-16)

Brandon Weinstock, CPA Past President (2009-10), Vibrancy Committee (2012-15)

John W. Wright Past President (1998-99)

Have you held a board position at MAC? Email Karen Jett at kjett@RedKnight.com with the year(s) and position(s) you held and she will add you to this list next year. Thanks!



The Association of Accountants and Financial Professionals in Business

Institute of Management Accountants— National Information

For more information on the Institute of Management Accountants visit: http://www.imanet.org/

The following North Penn Chapter Members hold or have held the following positions on the National Level:

William Brower, CMA, CFM—Board of Directors (2010-11), Chair (2005-06)

William Martin, CPA—Board of Directors (2010-11), National Vice President (2007-12), Performance Oversight and Audit Committee (2009-10)

Ed McCracken—Ethics Committee (2009-10)

Fred Schea, CMA, CFM, CPA—Chair (2008-09), Governance Committee (2009-10)

Clair Raubenstine, CMA, CFM, CPA—National President (1996-97)

Have you served at the national level? Email Karen Jett at kjett@RedKnight.com with the year(s) and position(s) of your service and she will add you to this list next year. Thanks!



The Association of Accountants and Financial Professionals in Business

Stuart Cameron McLeod Society

The Stuart Cameron McLeod Society (SCMS) is one of the premier professional groups in the financial field. Formed in 1934 as the Spot Club, the group was renamed in 1957 in honor of Stuart Cameron McLeod, a Spot Club Founder and IMA Executive Secretary from 1919 until his death in 1944. SCMS also stands for the "Society for Continuing Membership Service."

Applicants for membership in SCMS must meet specific criteria to be inducted into the organization. Members pay separate dues to SCMS, which IMA administers on behalf of the Society.

To find out more about SCMS, visit the SCMS web site at http://scms.imanet.org/.

Current Chapter members in the Stuart Cameron McLeod Society are:

Mr. William L Brower Jr, CMA, CFM
Neal Greenberg
Ms. Michele V. Kraynak, CMA
Mr William G. Martin, CPA
Mr. Clair M Raubenstine, CMA, CFM, CPA
Mr Frederick L. Root, CMA, CPA
Mr. Frederick E Schea, CMA, CFM, CPA



Certified Management Accountant Program

The Certified Management Accountant (CMA) credential is the professional for management accountants. The certificate provides distinction in today's economic climate and affords the opportunity to certify your expertise in the business areas that are critical to the decision-making process.

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Additional information on the Certified Management Accountant Program is available by contacting your chapter CMA Program Director, Philip Roth, CMA at roth@bergeys.com. Or, visit Villanova University at

http://www1.villanova.edu/villanova/continuingstudies/profedprog/noncreditprog/cma.html for information on our chapter sponsored review course. Or contact the IMA at:

Institute of Certified Management Accountants 10 Paragon Drive Montvale, New Jersey 07645-1759 1-800-638-4427

http://www.imanet.org/cma_certification.aspx

North Penn Members who Earned their CMA in the Past Year

Pass the CMA exam and see YOUR name here.



IMA's Certification for Accountants and Financial Professionals in Business

North Penn Chapter CMA's and CFM's

Ms Susan Ahern, CMA Mr. Ronald A. Kapusta, CMA, CFM

Mr. Thomas A. Albright, CMA, CFM

Ms Kimberly A. Koch, CMA, CFM

Mr. Thomas J. Balutis, CMA

Ms. Michele V. Kraynak, CMA

Mr Mark L. Bernhauser, CMA, CFM Mr. Gregory K. Landes, CMA

Mrs. Bonnie J. Bouchard, CMA, CFM Mr Christopher Laskowski, CMA

Mr Charles R. Bowers, CMA, CPA Mr William H. Lauzus, CMA, CFM

Mr. Bruce A. Leauby, CMA, CPA

Mr. William L Brower Jr, CMA, CFM Mr Paul E. Loux, CMA

Mrs. Karen I. Christiansen, CMA Ms. Jessica Lui, CMA

Ms. Bernadette M Courtright, CMA Mr William H Lundquist, CMA, CPA

Mr Steven R. Crowell, CMA Mr Bruce M. Margavitch, CMA, CFM, CPA

Ms. Lisa J. Cruikshank, CMA, CFM Mr Ashesh J. Mehta, CMA

Mrs. Meg E. Cunnane, CMA, CPIM Ms. Jamie L. Price, CMA, CFM

Mr. Clair M Raubenstine, CMA, CFM, CPA

Mrs Kristina R. Focht, CMA Mr Frederick L. Root, CMA, CPA

Mr Keith T. Foy, CMA

Ms Maryanne Rosner, CMA

Mr Richard K. Garrison, CMA Mr Philip M. Roth, CMA

Mrs Terese E. Goelz-Kazzaz, CMA, CFM, CPA Mr Philip J. Rush, CMA, CFM

Mr. Mark Patrick Guerin, CMA, CFM, CPA Mr. Frederick A Scenna, CMA, EA

Mr. Frederick E Schea, CMA, CFM Mr. Frederick E Schea, CMA, CFM, CPA

Kathleen M. Hamilton, CMA Mr David M. Schied, CMA

Mr. Christopher A Hayden, CMA, CPA Mr David K. Shaqfeh, CMA, CPA

Dr. Betsy Haywood-Sullivan, CMA Ms Linda A. Sowinski, CMA

Mr Gregory M. Herlan, CMA Ms. Holly A. Steel, CMA

Mrs Melissa L. Horton, CMA, CPA Mr. Brent C Thompson, CMA, CPA

Mr G. Scott Jacoby, CMA Mrs. Kathy Weaver, CMA

Mrs. Karen L. Jett, CMA Mr. Russell J. Whiteman, CMA

Mr Joshua R. Johnson, CMA

North Penn Chapter Roster Alphabetically by Name

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Join the North Penn Chapter to receive the full roster.

North Penn Chapter Roster Alphabetically by Company

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Join the North Penn Chapter to receive the full roster.

North Penn Chapter Roster

We are committed to keep our chapter's membership database information up to date. We apologize if your company affiliation, phone number, email address or professional designation is incorrect.

Please help us keep our information accurate by visiting www.imanet.org and updating your profile.

