



The Association of  
Accountants and  
Financial Professionals  
in Business

CLEVELAND EAST CHAPTER

INSTITUTE OF MANAGEMENT ACCOUNTANTS

FEB 2018

**CONGRATULATIONS  
IMA CLEVELAND EAST  
CHAPTER!**



[www.cleveast.imanet.org](http://www.cleveast.imanet.org)

#### INSIDE THIS ISSUE

Upcoming Meeting	2
Students	3
President's Message	5
Chapter Board	9
Technical Meetings	10
CMA Certification	13
National	16
C P E	17



From left to right:

**Congratulations to the Cleveland East Chapter on its success in the 2016-2017 IMA Competition. The chapter has won the following awards:**

**Carol Kuczer** holding the Silver Medal for the Warner Division Newsletter Competition

**Carlos Chavez** holding the Bronze Medal for the Warner Division Website Competition

**Sandy Brenner** holding the 15<sup>th</sup> Place in the Warner Division Chapter Standings

## February Technical meeting

## Federal Tax Update

Tuesday, Feb 20 at 6PM  
Doubletree Inn, Beachwood



**Tuesday Feb 13, 2018**  
IMA board meeting - noon

**Tuesday Feb 20**  
Federal Tax Update 6PM

**Tuesday Mar 13**  
IMA board meeting - noon

**Tuesday Mar 20**  
Ethics 6PM

**Wed - Fri Apr 25- 27<sup>th</sup>**  
44th Annual Meonske  
Professional Development  
Conference  
Kent State University



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## FEBRUARY TECHNICAL MEETING

As a former college athlete, Angel understands the preparation it takes to know your team, know the game plan and execute it for the win. She uses this same approach when it comes to working with clients. Angel is always looking for that competitive advantage business owners can use to realize tax savings. Angel focuses on tax planning and compliance, as well as reporting and minimization strategies. While she advises businesses in the distribution and manufacturing industries, a significant portion of her time is spent within the real estate and construction industry. Angel also leads the firm's tax compliance related to health and welfare plans.

- ☐ Commercial Real Estate Development Association (NAIOP)
- ☐ Spartan Club Case Western Reserve University (President)
- ☐ Bethany Baptist Church
- ☐ Ohio Society of CPAs
- ☐ American Institute of CPAs

Angel loves watching and playing all sports, but particularly the U.S. women's soccer team. If not for her star role as an accountant at Cohen & Company, Angel's dream job would be coaching women's softball. She also loves spending time with her dog in the park. Angel lives in Lakewood, Ohio.

### Credentials & Education

- ☐ Certified Public Accountant (Ohio)
- ☐ Master's of Taxation,
- ☐ The University of Akron
- ☐ Master's of Accountancy, Case Western Reserve University
- ☐ B.S., Case Western Reserve University

**Angel Rice, CPA, MT, MAcc**

**Manager, Tax**

**216.774.1140**

**[arice@cohencpa.com](mailto:arice@cohencpa.com)**



### Areas of Focus

- ☐ Private Company Services
- ☐ Business & Individual Taxation
- ☐ Retirement Plans
- ☐ Accounting Methods
- ☐ Real Estate & Construction
- ☐ Wholesale & Distribution
- ☐ Manufacturing

Tammy Tran is a senior in the PCS tax department of Cohen & Co. She provides tax consulting and compliance for corporations and partnerships with an emphasis on state and local income/franchise tax.



In her free time, Tammy fixes up her house in Cleveland Heights and is a big fan of DIY. When she's not working on renovation projects, she spends time in the kitchen trying out new recipes.

### Credentials & Education

- > B.S., Case Western Reserve University

### Areas of Focus

- > Private Company Services
- > Business & Individual Taxation
- > State and Local Income/Franchise Taxation



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## ***STUDENT LEADERSHIP CONFERENCE***

# SAVE THE DATE

HILTON ST. LOUIS | NOVEMBER 1-3, 2018



Learn how you can spark your career at IMA's Annual Student Leadership Conference. You'll hear from inspiring speakers, create a network of contacts, and connect with industry leaders in a dynamic, friendly environment. The Student Leadership Conference is held each November.



# SCHOLARSHIP FOR OHIO ACCOUNTING STUDENTS

## 2018 Ohio Regional Council Scholarship Award Program

All full-time accounting students (undergraduate and graduate) with an accounting major enrolled in Ohio colleges/universities are eligible to apply for the Ohio Council sponsored IMA scholarships. Selected individuals will be awarded one of three scholarships of three levels - \$2,500, \$1,500 and \$1,000. (Indiana University East is considered an Ohio university affiliated with the Dayton, Ohio chapter)

### Selection of Candidates

All candidates will be considered equally with no bias to race, creed, or background and will be judged independently on the basis of the applicant's ability to meet the criteria as outlined in the application. If for some reason a selected individual declines his/her award or becomes ineligible, an alternate candidate will be selected to receive the award.

### Deadline

The DEADLINE for candidates to submit applications to IMA- Ohio Council is March 17, 2018. Applications shall be emailed (in pdf format) to Dr. Wendy Tietz at [wtietz@kent.edu](mailto:wtietz@kent.edu). Any questions regarding this program can be directed to Dr. Wendy Tietz at [wtietz@kent.edu](mailto:wtietz@kent.edu) or [imaohiocouncil@gmail.com](mailto:imaohiocouncil@gmail.com).

### Method of Disbursement/Post-Acceptance Requirements

Scholarships will be disbursed in two (2) equal amounts: 50 percent will be awarded at the beginning of the fall and spring semesters. Each payment is contingent upon receipt of the following documentation:

- Scholarship winners must provide proof of registration and a copy of the recipient's most recent transcript.
- Scholarship winners **MUST** attend the 44th annual Meonske Conference held at Kent State University on Thursday, April 26, 2018 or an approved alternate council or chapter event in April or May.
- After being selected to receive the award, the winners **must** make a one-year commitment to join and utilize their membership in the Institute of Management Accountants and **attend at least two** functions through a local chapter or Ohio Regional Council to receive professional guidance and support.
- Scholarship monies will be forwarded directly to the school's bursar's office or financial aid department.

### Announcement of Winners

On or before April 10, 2018.

### For questions, contact:

Director - Scholarships

Dr. Wendy Tietz

(330)672-1116

Email: [wtietz@kent.edu](mailto:wtietz@kent.edu)



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Financial Professionals  
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**Insiders**  
**Monthly Access**  
A Publication of the Cleveland East Chapter

Page 5

## PRESIDENT'S MESSAGE



Cleveland East board looks forward to seeing everyone at our February 20th technical meeting. This meeting will be a tax update presented by Cohen & Company. This is our second most popular meeting. Angel Rice from Cohen Company has helped put this program together for several years. Given the Federal changes, this should be a very interesting presentation with lots of discussion. Bring your questions.

Joseph E. Haubrich, an economist in the Research Department of the Federal Reserve Bank of Cleveland, gave another great presentation at our January meeting. After the FED Board meeting, he will provide us with a summary update on the economy from his presentation that we will publish in next month's newsletter. We will also have information and a link to a film he developed on the financial crisis of 1907 which lead to the setup of the Federal Reserve Bank.

Joe is head of the Financial Markets and Institutions Unit. His research interests are banking and financial markets, uncertainty, and organizational design.

See you all there.

*Please register at:*  
<http://cleveast.imanet.org/technicalmeetingregistration.html>



### SPONSORS

We would like to thank the following organizations for their support in sponsoring the IMA Cleveland East Chapter.

If you would like to have your business appear on this page, please contact  
Sandra Brenner at (216)839-7288 or Email:  
[sandra.brenner@basf.com](mailto:sandra.brenner@basf.com).



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Honey Wess  
Director

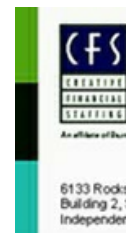


Harry Lader, Ph.D.  
Certified MOS Expert

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Independence, OH 44131

Direct Line:  
(216) 750-6165  
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Deadline for submitting information for next newsletter is the Monday following the technical meeting. Send your submissions to Carol Kuczer at: [ckuczer@ddr.com](mailto:ckuczer@ddr.com)



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Accountants and  
Financial Professionals  
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CLEVELAND EAST CHAPTER



Page 6

## *Spot light on board members*



**A**SHLEY HINKLE IS the Director of Publicity for the the Cleveland East Chapter of IMA.

Ashley Hinkle | Senior Accountant |

[ahinkle@cohencpa.com](mailto:ahinkle@cohencpa.com) – Ashley started at Cohen & Company in 2013. Ashley specializes in tax compliance issues specific to regulated investment companies, including master limited partnership mutual funds, along with private investment partnerships (both hedge

funds and private equity funds). She has been involved in the IMA Cleveland East Chapter since her college days. She was President of the student chapter at Hiram in 2012 and 2013. She is now on the board as head of publicity for the chapter. She is a member of the Ohio Society of Certified Public Accountants (OSCPA) and the American Institute of Certified Public Accountants (AICPA).

## *IMA Reaches 100,000 Member Milestone on the Cusp of its Centennial*

MONTVALE, N.J., Jan. 29, 2018 /PRNewswire/ -- IMA® (Institute of Management Accountants), the association of accountants and financial professionals in business, today announced a historic milestone of reaching 100,000 members for the first time in its nearly 100-year history. The timing of this achievement coincides with IMA's upcoming 100-year anniversary celebration, which begins in June at IMA's Annual Conference and Expo in Indianapolis and concludes at its conference in San Diego in 2019.

Named "Professional Body of the Year" by The Accountant/International Accounting Bulletin, a prestigious global accounting publisher, IMA reached this milestone through strong growth across each of its regions – the Americas, Asia/Pacific, Middle East/India, and Europe. International markets, especially, were high-growth areas in recent years due to IMA's ability to deliver value with a global network and localized products and services, enabling strengthened careers, organizations and economic development.

"Globalization has been a significant driver for our continued expansion," said IMA President and CEO, Jeff Thomson, CMA, CSCA, CAE, who recently traveled to Brazil and India to deepen IMA's international relationships. "As economies develop, more skilled finance and accounting professionals are needed to offer insight and foresight to businesses and governments."



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## ***2018 - 2019 IMA CHAIR - ELECT***

### **IMA Nominating Committee Nominates Christian Cuzick, CMA, Fiscal 2018-2019 Chair-Elect**

The Nominating Committee of IMA is pleased to announce that Christian Cuzick, CMA, has been named its nominee for the Chair-Elect position for IMA's fiscal 2018-2019 period (July 1, 2018, to June 30, 2019).

Cuzick is the Vice President of Finance at Johnson & Johnson Vision Surgical, in Santa Ana, Calif. He has been with Johnson & Johnson (J&J) for more than 13 years, holding positions of increasing responsibility both internationally and in the U.S.

Cuzick started his career at Johnson & Johnson in 2004 as a Business Analyst at LifeScan. In 2007, he was promoted to Finance Director in the Medical Device segment, relocating with his family to Zug, Switzerland. During his time in Switzerland, Cuzick held the position of Treasurer and President for the Swiss IMA Chapter. Cuzick repatriated to the U.S. in 2012 to take the role of Finance Director, Innovation within Medical Devices. In his most recent role, he served as the Senior Director, Janssen Canada, located in Toronto, Canada. Before joining Johnson & Johnson, Cuzick held various positions in Marketing at BASF and Sony.

Cuzick received a BA in International Business from San Diego State University and his MBA with an emphasis in Finance from the University of San Francisco. He is a CMA® (Certified Management Accountant). Cuzick has been a member of the IMA Global Board of Directors since 2012, has chaired the Member Relations Committee and also served as a member of the Governance, Planning and Development, and Nominating Committees.



# IMA ANNUAL CONFERENCE

**ACE2018 | INDIANAPOLIS**

IMA's Annual Conference & Expo

— ∞ —  
**JUNE 16-20, 2018**



## Mark Your Calendar!

**Registration for ACE2018 will open mid-February. Start planning your trip to Indianapolis today!**

**Register by March 31 to get these early bird rates:**

Member: **\$1,250**

Nonmember: **\$1,500**

## 8 Specialty Tracks

Designed to fit your career needs!  
Learn from experts at the top of their field.

-  Planning, Budgeting, and Forecasting
-  Small Business and M&A
-  Ethics
-  Technology
-  Financial Close and Reporting
-  Leadership & Professional Development
-  Accounting Hot Topics
-  Governance, Risk Management, and Internal





## 2017 -2018 BOARD OF DIRECTORS

Office	Name	Email	Telephone
President	Ernie Brass	bcd_net@yahoo.com	(440) 946-1952
Secretary	Enrico Varricchio	emdnv@oh.rr.com	(216) 368-2822
Treasurer	Robin Schade	robin.schade@imcdus.com	(216) 228-8900 x262
VP Administration	Jimmy Renz	james.renz@imcdus.com	(216) 228-8900
VP Professional Education	Ernie Brass	bcd_net@yahoo.com	(440) 946-1952
VP Membership	TBD		
Director - Newsletter	Carol Kuczer	ckuczer@ddr.com	(216) 755-5746
Director - Social Media	TBD		
Director Student Scholarships	TBD		
Director Academic Relations	TBD		
Director CMA	John Ashba	johnashba@hotmail.com	(440) 228-7360
Director Publicity	Ashley Hinkle	hinkle1215@gmail.com	
Chair of the Audit	Vince Pona	vpona@millrose.com	(440) 478-7612
Regional Council Delegate	Sandra Brenner	sandra.brenner@basf.com	(216) 839-7288
Director - Meetings	John Senderak	jfsenderak@gmail.com	

Need extra help with special projects?

Want to give a helping hand to an accounting student?

Interns are available to help your company. Both the University of Akron and Hiram College have accounting students that are ready, willing and eager to gain real life experience.

For more information, please contact Robin Schade at 216.227.3011 or via email at [robin.schade@imcdus.com](mailto:robin.schade@imcdus.com).

### Board Meetings

Tuesday, Jun 27, 2017 6 PM in person

Tuesday, Jul 25, 2017 6 PM in person

Tuesday, Aug 8, 2017 6 PM in person

Tuesday, Sep 12, 2017 Noon conference call

Tuesday, Oct 10, 2017 Noon conference call

Tuesday, Nov 14, 2017 Noon conference call

Tuesday, Dec 12, 2017 6 PM in person

Tuesday, Jan 9, 20178 Noon conference call

Tuesday, Feb 13, 2018 Noon conference call

Tuesday, Mar 13, 2018 Noon conference call

Tuesday, Apr 10, 2018 Noon conference call

Tuesday, May 8, 2017 Noon conference call



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# 2017 - 2018 TECHNICAL MEETINGS

EVENTS

Date	Time	Event
Thursday, August 15, 2017	6:00 PM	Gaming in the State of Ohio - Northfield Park
Tuesday, September 19, 2017	6:00 PM	Social Security
Tuesday, October 17, 2017	6:00 PM	Student Night - LinkedIn
Friday, November 17, 2017	6:00 PM	Controller's Workshop
Tuesday, January 16, 2018	6:00 PM	Economic Update
Tuesday, February 20, 2018	6:00 PM	Federal Tax Update
Tuesday, March 20, 2018	6:00 PM	Ethics
Tuesday, April 17, 2018	6:00 PM	Accounting Update at John Carroll University
Tuesday, May 15, 2018	6:00 PM	Five S (quality) - ISO Certification
Wed & Thu, April 25 & 26, 2018	8 AM - 5 PM	Annual Meonske Conference Pre-Conference Workshop (2 days)
Friday, April 27, 2018	8 AM - 5 PM	Annual Meonske Conference

## Member Anniversaries

## IMA GLOBAL CORE VALUES



CONGRATULATIONS

### Years Members

- 47 A. Maschke
- 41 Mario Mulig
- 25 Renee Lesko
- 25 James Yates
- 22 David Boutton
- 12 James Tilk
- 8 Lisa Sutton
- 1 Steven Virost
- 1 Christoph Von Saucken
- 1 Matthew Goss
- 1 Laura McLean

### *Respect for the Individual*

We treat each other with respect and dignity, valuing individual and cultural differences. We communicate frequently and with candor, engaging in healthy debate and listening to each other, regardless of position or level. We work hard to create an environment that respects individuals in an atmosphere of open communication, growth, and learning.

### *Passion for Serving Members*

We enable individuals to use their capabilities to the fullest to deliver exemplary products and services to members. That enablement extends to being passionate advocates in advancing our global profession. We care for all members and each other - building enduring relationships and driving continuous improvement. We appropriately recognize our volunteer leaders, who are so giving of their time and expertise.

### *Highest Standards of Integrity and Trust*

We understand and abide by the IMA Statement of Ethical Professional Practice in our everyday actions. Our personal conduct ensures that the IMA name is always worthy of trust - our members around the globe deserve nothing less. We treat each other fairly, keep our promises, make decisions objectively, take responsibility for our actions, and admit our mistakes. We maintain confidentiality as appropriate.

### *Innovation and Continuous Improvement*

We believe innovation and a spirit of continuous improvement are engines that keep us relevant, vital, and growing. Our culture embraces creativity and seeks different perspectives. We behave like owners of a "business," managing risks and identifying new opportunities in serving members and advancing the profession.

### *Teaming to Achieve*

We encourage and reward both individual and team achievements, proactively working across organizational boundaries to always "remember the member." Our spirit of team achievement extends to advancing our professional and to being responsible and caring partners within our various communities.

### New Members



## ***How All Finance Leaders Can Help Shape Corporate Culture***

Corporate culture is a powerful thing. A lackluster or negative culture drives top talent away. An inspiring and positive culture attracts it and motivates teams to perform at their best. And when workers are happy in their jobs, they are more likely to become brand ambassadors for their employer, helping to influence public perception of the company's products, services, mission, values and much more. That, in turn, helps the firm to build a reputation as an employer of choice.

Finance leaders can play a pivotal role in helping to shape their company's corporate culture — and they should seek out and embrace that opportunity. Yet only about half (51 percent) of the CFOs interviewed for a **recent Robert Half Management Resources survey** said they are involved in that process. Nearly a quarter (22 percent) said they don't contribute at all.

As a finance leader, where do you fall on this spectrum? If you haven't paid much attention to your role in shaping corporate culture before now, you may want to consider making it one of your top responsibilities moving forward. Senior finance executives can help to build and champion corporate culture by defining (or refining, when necessary) the company's core values and the way they translate into — and form the foundation of — the firm's culture

### **Get others thinking about corporate culture**

One way to reinforce corporate culture is by helping employees feel more connected to it, and to see the company's values and principles in action every day. If your corporate culture is one of openness and transparency, for example, you could take a more active role in improving communication about the health of the business by sharing details of financial performance and failures. If your culture emphasizes teamwork, celebrate successes so that all staff members **understand how their work is having an impact**.

Also, find ways to drive executive collaboration around corporate culture. While a company's culture may evolve on its own, to a degree, executives can set the tone and provide direction for how it evolves. Kick off the discussion at senior management meetings by asking, "Are we happy with our current workplace culture?" or "What exactly is our workplace culture?" The answers to these questions could be a wake-up call that management should be doing more to modify, or strengthen, the prevailing corporate culture.

Here are three other ways you can make an impact on corporate culture as a finance leader:

#### **1. Keep corporate culture in focus during the hiring process**

When reading resumes and interviewing candidates, look for more than just technical abilities and financial knowledge. Identify **professionals with top-notch soft skills**. Also, try to make sure that every new hire is someone likely to support the company's core values.



## ***How All Finance Leaders Can Help Shape Corporate Culture - continued***

For example, if your business has made innovation a top priority, hire professionals who can build processes designed to spur new ideas.

That doesn't mean you should hire individuals who won't question the status quo when appropriate; you're looking for people who can readily understand what drives your company forward and are keen to help the business achieve its goals.

### **2. Help your employees build their careers**

Does your corporate culture emphasize **professional development and growth**? If so, is leadership making that clear to employees and helping them visualize their future at the firm? Like many companies, this might be an area where your business needs to step up its efforts. In a **recent Robert Half survey**, 40 percent of professionals said their managers never discuss their career paths with them. However, 37 percent of workers interviewed said they would like to discuss their career paths at least quarterly, and another 45 percent want to review their options annually.

Become known as a manager who touches base with staff on a regular basis to make sure they're still **satisfied with their job** and future options. Not only help them set steps toward their career goals but also make it easier for them to reach those milestones by connecting them with technical training and leadership development in preparation for senior roles. In words and deeds, let them know that they have a real future within your firm and that career advancement is a core part of your culture.

### **3. Lead by example**

A company's culture is largely the product of its history and its past leaders — but it is always evolving. As a finance leader, you can, and should, take an active interest in reinforcing the positive elements of your company's culture so it continues to grow and become stronger.

You can do this by "living" your corporate culture and setting a good example for your team. Show pride in your organization, acknowledge the work of others, build positive workplace **relationships with colleagues in other departments**, and more. Small but powerful everyday actions like these can help to create a work environment where positivity and productivity flourish — the type of corporate culture that any talented professional would want to be part of.

*Accountemps, a [Robert Half](#) company, is the world's first and largest specialized staffing firm for temporary accounting, finance and bookkeeping professionals. Accountemps has 325 locations worldwide. More resources, including job search services and [career advice](#), can be found at [roberthalf.com/accountemps](http://roberthalf.com/accountemps).*

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## THINGS TO CONSIDER ABOUT CMA CERTIFICATION



### Cleveland East Chapter Gleim IMA Chapter Partnership

Cleveland East Chapter members receive a significant discount off all Gleim CMA and CPE study materials including the new ethics course. Your Cleveland East IMA Chapter has partnered with Gleim to ensure your success on the CMA exam! Working together, we will provide you the necessary study tools to prepare for this difficult exam. Gleim has been preparing candidates for success with their extensive self-study course for over 30 years! The Gleim Review System enables you to identify your weak areas so you know where to focus your efforts and GUARANTEES that you will pass each exam part the first time. Our goal is that you achieve success while minimizing your frustration, cost, and time. As a member of the chapter, you are eligible for significant discounts on any of Gleim's CMA materials, as well as Gleim CPE.

To learn more about the program, or to print order forms, visit the Cleveland East Chapter website.

Gleim is excited to partner with Tri-C Corporate College to offer a live review for the Certified Public Accountant exam. This review will be held at the Corporate College East campus with weekly sessions specifically designed to help you pass the exam quickly and effectively.

This offering is unique in terms of its affordability and the one-on-one attention you will receive. These review courses provide candidates with the tools, information, and knowledge necessary to pass the CPA exam the first time.

If you are a candidate who wants to pass the CPA exam quickly and appreciates the added value of a live instructor, call Sheryl Hunt today at (216) 987-0233 or email [sheryl.hunt@tri-c.edu](mailto:sheryl.hunt@tri-c.edu) to register. You can also check out their [CPA web page](#) for more information.

Class size is limited, so register NOW to reserve your seat.

## THE GOLD STANDARD

### Salary

Findings of IMA's 20th Annual Salary Survey indicate that professionals holding IMA's CMA certification have greater earning power - 24% higher in salary and 31% higher in total compensation - than their non-certified colleagues. These findings appear in the June 2009 issue of IMA's *Strategic Finance* magazine.

### Competitive Advantage

Businesses around the world rely on CMAs for accounting, finance and information management and most importantly, for the strategic planning and business solutions provided by these qualified professionals. Companies such as 3M, Boeing, DaimlerChrysler, DuPont, Hewlett-Packard, IBM, Johnson & Johnson, Milliken and Procter & Gamble recognize that employing CMAs helps to improve company performance in aggressive global business arena.



### Review Schedule Based on Gleim Publications Corporate College:

- For the CMA Exam the review for each part of the exam is about six weeks.
- The class meets initially for a 1-hour orientation.
- 5 more meetings, one a week, for 3 hours each.
- Students will take the exam part covered by the review within 2 weeks of the last live class.
- The review for each successive exam part begins 1 to 2 weeks after the review for the previous parts ends.

### Personal Satisfaction

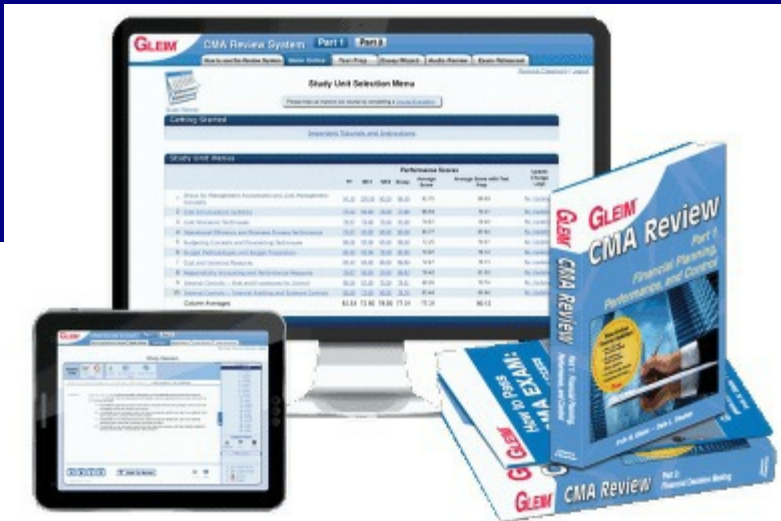
Prove your ability to become a strategic business partner, while you also enhance your self-confidence, your sense of accomplishment, and your resume.

### Professional Recognition

The CMA designation represents a broad business competency and mastery of the management-level skills required to add value, drive business performance, and build quality financial practices within organizations. The program objectively tests and validate expertise in areas essential to analyzing, managing and evaluating business solutions that contribute to the success of an organization. The CMA credential indicates a commitment to excellence based on a strong, ethical foundation and dedication to lifelong learning.

**Start On Your Road  
to CMA Certification Now!**

**GLEIM**



...Gleim is pleased to announce many new exciting updates to the Gleim CMA Review course. The CMA Gleim Online course has been expanded with more multiple-choice questions, essays, and updates to the digital book. For the first time ever, Gleim has included supplemental videos in the online course, which feature Dr. Passard Dean, CMA.

### [Save 15% on the newly updated Gleim CMA Review System.](#)

Over 150 new multiple-choice questions are now available in Gleim CMA Review, which includes the largest test bank in the industry. There are now over 3,100 ICMA-released and expertly authored questions in Gleim Test Prep. CMA candidates will also notice new functionality within Test Prep. While working in Gleim Study Sessions within Test Prep, candidates can now open and reference the digital book while answering questions. This functionality is particularly useful if candidates are frequently missing questions or need more clarification on certain topics.

The Gleim CMA Review System also now features 20% more essays. CMA candidates can practice answering exam-emulating essays in the Gleim Online Course and in the Gleim Essay Wizard.

Supplemental videos, featuring Dr. Passard Dean, CMA and Professor of Accounting at St. Leo University, will be available in the Gleim Online course starting in early April. These videos feature detailed walk-throughs of the multiple-choice questions that candidates find to be the most difficult. [Click here](#) to see a sample of the type of videos that will be added to the Gleim Online course.

Updates have been made to the Gleim CMA Review digital book to include improvements based on candidate feedback as well as more elaboration on key topics. The Gleim materials are written by professional educators, Dr. Gleim and Dr. Flesher, who have over six decades of combined teaching experience. Dr. Gleim was recently recognized by the Fisher School of Accounting at the University of Florida, a top ten accounting school, for his “renowned accounting [materials] that to this day are the field's authoritative learning resource.”

[Click here](#) to learn more about Gleim CMA Review's newly updated materials and save 15% now, or you can [try the course for free here](#).

We look forward to helping you pass the CMA Exam.

Team Gleim

800.874.5346

[accountingteam@gleim.com](mailto:accountingteam@gleim.com)

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Gainesville, FL 32606





IMA's Certification for  
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### ***Advancing the profession***

IMA is dedicated to rebalancing the accountancy profession by educating society regarding the business building role of management accountants and finance professionals working inside organizations.

### ***Certified Management Accountant (CMA®) - The Gold Standard***

Join a leading group of professionals who have advanced beyond the practical accounting skill set by earning IMA's prestigious global certification, the Certified Management Accountant (CMA®).

Evolve into a strategic business partner committed to a standard of excellence grounded on a strong ethical foundation and a lifelong commitment to learning.

Position yourself for career advancement and greater earning power. Gain a significant competitive advantage while demonstrating accounting, finance, information management and strategic planning skills necessary to drive business performance in the changing global economy.

#### **VISION STATEMENT**

The world's leading association for management accounting and finance professionals.

#### **MISSION STATEMENT**

To provide a dynamic forum for management accounting and finance professionals to develop and advance their careers through certification, research and practice development, education, networking, and the advocacy of the highest ethical and professional practices.





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# IMA NATIONAL

## PUBLICATIONS

### Strategic Finance

IMA's flagship publication is an award-winning monthly magazine that provides the latest information about practices and trends in finance, accounting, and information management.

### Management Accounting Quarterly

MAQ is a quarterly, refereed online journal that contains in-depth articles by and for academics and practitioners of accounting and financial management.

### IMA Educational Case Journal

The IECJ® is a quarterly, online journal whose mission is to publish teaching cases in management accounting and related fields.

## PROGRAMS

### Educator Resources

IMA provides special tools and resources for the professionals who are developing the industry's future leaders. Academic members have access to IMA's ethics curriculum, case studies, webinars, research grants, mentor program, and many other teaching resources.

### Leadership Academy

The IMA Leadership Academy is designed to assess your leadership status, enhance your skills and recognize your leadership achievements.

### IMA Webinars

IMA's Inside Talk Webinar Series is a highly popular monthly webinar series that explores relevant topics from your professional and delivers timely information to broaden your knowledge and improve your performance.

## NETWORKING

### LinkUp IMA

The online professional network created exclusively for IMA members allows you to participate in groups related to topic areas or industries, IMA regional chapters and councils, subject matter and CMA study groups. You can post announcements and events, utilize share workspaces, find jobs and more.

### LinkedIn

Strengthens and extends your existing network of trusted contacts. It is a networking tool that helps you discover inside connections to re-connect with colleagues and classmates, power your career and get answers.

IMA's mission is 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.

We do this by:

- Offering a rigorous, highly respected credential - the CMA - that recognizes and rewards expertise
- Building a peer network of professional relationships to share industry experience, access career opportunities, and make business contacts to last a lifetime
- Providing extensive education programs to advance professional knowledge, increase leadership potential, and satisfy CPE requirements
- Giving a voice to the profession with insightful and timely journals and newsletters
- Promoting leading-edge research and industry best practices
- Advocating for the profession in a challenging regulatory environment

IMA currently represents more than 60,000 accountants and financial professionals in business. The participation of each of our members makes the success of our mission possible.

## KEY CONTACTS

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## Power Your Potential

IMA is the resource for developing, certifying, and connecting the world's best accountants and financial professionals working in business.

## What is management accounting?

Did you know that many accounting grads begin their careers in public accounting firms, but the majority of those leave in just a few years?

The fact is nearly 75% of financial professionals work in business as management accountants: financial analysts, controllers, treasurers, and chief financial officers. Management accountants provide critical insights on ethical and regulatory requirements and are integral to business strategy and decision-making. Gain leadership experience, explore your future career options, and build your résumé and professional network. With the right preparation and training, you will be equipped with real-world competencies that will make you ready for the challenges you'll face immediately on the job.

## Membership Benefits

- Differentiate yourself by taking the CMA exam while still in school
- Develop leadership skills to build your résumé
- Enjoy all member benefits at a significantly reduced rate

## Student Testimonial

"I knew I wanted to major in accounting, and I wanted to make a difference, but I just didn't know how to build on that. That's how I knew I wanted to start a student chapter on my campus." - Kevin Cornwell, President, University of Texas at Dallas Student Chapter



The Association of  
Accountants and  
Financial Professionals  
in Business

# Continuing Professional Education

*IMA conducts more than 50 webinars every year at no cost to our members. Each qualifies for 1 to 1.5 hours of NASBA-approved CPE credit(s). Seats fill up quickly.*

**Inside Talk:** Our highly popular monthly series on timely, emerging issues and relevant topics such as technology, data analytics, revenue recognition, expense reporting and continuous accounting.

**IMA's Leadership Academy:** Hosts a monthly webinar series that empowers entry- and intermediate-level management accountants to become leaders within the profession

## Webinar Schedule -

### Mentoring the IMA Way

Leadership Academy

February 06, 2018 01:00 PM - 02:00 PM

### Preparing for the IPO - Are You Ready?

Inside Talk

February 15, 2018 01:00 PM - 02:00 PM

Webinar Archives

IMA Members:

Play past webinars on LinkUp IMA

Webinar Policies

Webinars use standard Web browser technology and audio broadcasting

With full attendance, you may download a PDF certificate of completion

It may take up to 30 days for your CPE credit to be reflected in your transcript

Replay webinars are in the archive 5-10 days after the live event but do not earn credits



# Continuing Professional Education



*New courses included in the Gleim Online CPE*

Gleim has recently added the following courses to our Online CPE catalog:

- AICPA Clarified Attestation Standards
- Audit Evidence: Applications
- Choosing the Best Entity for a New Business
- CMA Ethics
- Compilation of Financial Statements -- Clarified Standards
- Cost Management Terminology and Concepts
- Individual: Above-the-Line Deductions and Losses (2017)
- Individual: Exclusions from GI (2017)
- Individual: Itemized Deductions (2017)
- Internal Control: Basic Concepts for the External Auditor
- Introduction to Financial Statement Analysis
- Landlord and Tenant
- Limited Liability Companies
- Property Transactions: Character and Recognition for Property Sales and Exchange (2017)
- Valuing Inventory to Avoid Poor Pricing Decisions

View these new courses as well as our entire listing of over 75 courses including those which cover Accounting, Auditing, Regulatory Ethics, Management, Business Law, and Taxation at

[https://urldefense.proofpoint.com/v2/url?u=http-3A\\_\\_www.gleim.com\\_accounting\\_cpe&d=DwIFAg&c=-OIE4745p1S5wbqCzaa1dNe21NrKk14FraizFYWC6vg&r=hN\\_Q\\_lxkNLNqftkxgPhSGw&m=RD3VWZz4rKVD3He5bkf-brbpqxLhV5HzZpI8dFVDPv8&s=S17GJVmKhK\\_mYWqdRj8qqbNHGzXy6Fj-CLasiGxih3U&e=](https://urldefense.proofpoint.com/v2/url?u=http-3A__www.gleim.com_accounting_cpe&d=DwIFAg&c=-OIE4745p1S5wbqCzaa1dNe21NrKk14FraizFYWC6vg&r=hN_Q_lxkNLNqftkxgPhSGw&m=RD3VWZz4rKVD3He5bkf-brbpqxLhV5HzZpI8dFVDPv8&s=S17GJVmKhK_mYWqdRj8qqbNHGzXy6Fj-CLasiGxih3U&e=)

Please contact Debbie Martin by 02/16/2018 to take advantage of a special offer of up to 40% off the regular price of our CPE packages.

Please contact Debbie Martin, CPE Administrator to take advantage of a special offer off the regular price of our CPE packages.

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**Please visit our home page.**

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