



The Association of  
Accountants and  
Financial Professionals  
in Business

CLEVELAND EAST CHAPTER



INSTITUTE OF MANAGEMENT ACCOUNTANTS MAR 2019

Congratulations 2018 IMA Chapter Award Winner

Cleveland East

- Gold Metal for the Warner Division Newsletter Competition
- Gold Metal for the Warner Division Website Competition

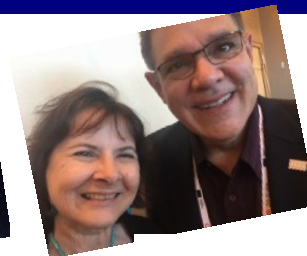


**Insiders**  
Monthly Access  
A Publication of the Cleveland East Chapter

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

#### INSIDE THIS ISSUE

Current Technical Meeting	2
Annual Meonske Conference	3
President's Message	6
Chapter Board	10
Technical Meetings	11
CMA Certification	15
National	18
C P E	19



**John Carroll**  
UNIVERSITY

## March Technical meeting Dealing with Large Databases

Presented by Eugene Andres, retired  
professor of information systems

Tuesday, Mar 19, 2019 at 6PM

**John Carroll University,**

The Dolan Center, Room A 101

1 John Carroll Boulevard,

University Heights, OH 44118



#### 2019

Apr - Plant Tour 6PM

Apr 25, 26 Meonske Conference  
KSU, Kent OH

May 21 - Ethics - 2CPE

## Annual Meonske Professional Development Conference Celebrating 45 Years

**16 Hours of CPE April 25-26, 2019 Kent State University**  
[ohio.imanet.org](http://ohio.imanet.org)



Connect with Us



Follow Us



Join Our Group



Contact Us



## ***March meeting - dealing with large databases***

### **Speaker: Professor of Information Systems Eugene A. Andres, Retired**

Adjunct Faculty

IT Center of Excellence

Cuyahoga Community College

4250 Richmond Road

Highland Hills Village, Ohio 44122

Professor Andres retired recently from Cleveland Clinic, where he wrote T-SQL queries to support medical research, and trained revenue cycle users in Epic EHR. His current project is teaching students in a semester boot camp to earn their Linux Pro certification and TestOut Skills Guarantee to build their resume. His other passion is evangelizing Big Data Analytics, Artificial Intelligence, and Blockchain as hot career pathways for students and professionals.

Professor Andres has “40-something” years of professional experience in higher education, business, and industry as a network engineer, information systems analyst, designer, programmer, technical writer, and trainer/teacher. He earned a MS Biometry (Healthcare Informatics) and a BS Engineering from Case Western Reserve University.

Once on Cedar Road West from I-271 Interchange



- Follow Cedar Road West for approximately 3 miles through a series of traffic lights (past Beachwood Place on your left and Legacy Village on your right) until you reach Warrensville Center Road. Turn left onto Warrensville Center Road (University Square shopping center and Whole Foods Market are at the corner).
- Follow Warrensville Center Road south for approximately 1 mile, staying in the right lane. When you reach the Fairmount traffic circle, turn right onto the circle and move to the center lane. Go almost completely around the circle until you reach John Carroll Boulevard (formerly North Park Boulevard North East). There will be a gas station on your left and a shopping center on your right.
- You will see the main campus entrance directly in front of you. Continue straight, going through one stop sign, and then turn left into campus. At the entrance gate, inform the gatehouse attendant that you are attending the IMA meeting in the Dolan Center.



## Ohio Council IMA presents *The Annual Meonske Professional Development Conference at KSU, Kent*

Day 1: Thursday, April 25 (8 Hours CPE)

7:30 - 8:10 a.m. Registration & Welcome

8:10 - 8:20 a.m. "IMA and CMA Update" Ginger White, CMA, CSCA

8:20 - 9:10 a.m. "High Impact Conversations" - Tim Gearty, CPA, JD, CGMA

9:10 - 9:45 a.m. "Fixing the Broken Budgeting Process in a Digital Age", Gary Cokins, CPIM

9:45 - 10:15 a.m. Morning Refreshments, Vendor Displays, and Networking

10:15 - 11:30 a.m. "Will You Be Ready for the Changes Caused by Artificial Intelligence (AI) on the Accounting and Finance Function?" Tim Gearty, CPA, JD, CGMA

11:30 a.m. - 12:05 p.m. Lunch Moderator Jeff Bissell, CPA, CFO, and Treasurer, NGM Aerospace

12:05 - 12:15 p.m. Student Awards and Introductions

12:15 - 1:30 p.m. "The Debrief-Focused Approach in Business and Life"

Robert "Cujo" Teschner, Lt. Col. USAF, Founder & CEO, VMax Group

1:30 - 2:45 p.m. Afternoon - 2 Concurrent Tracks

Track 1 "Women's Leadership Positions: Creating a Better World for All"

Moderator Dr. Deborah Spake, Dean, College of Business, Kent State University

Panelists Linda Devonish-Mills, CMA, CPA, CAE, IMA Director, Diversity and Inclusion

Margie Flynn, Senior Partner, BrownFlynn, Tracy Lindberg, Partner, Ernst & Young

Ginger White, CMA, CSCA, Chair of IMA's Global Board of Directors

Track 2 "Delivering Excellence in Accounting and Finance"

Presenter/Moderator Gabriel Zubizarreta, CPA

Panelist J. Stephen McNally, CMA, CPA

2:45 - 3:05 p.m. Afternoon Refreshments, Vendor Displays, and Networking

3:05 - 4:30 p.m. "Women's Leadership" (Continued)

"Delivering Excellence" (Continued)

4:30 p.m. Wine and Cheese Reception Sponsored by Silicon Valley Accountants



## Meonske Conference at KSU, Kent

### Friday Session

#### Day 2: Friday, April 26 (8 Hours CPE)

7:30 - 8:00 a.m. Registration & Welcome

8:00 - 9:45 a.m. "Financial Reporting Panel"

Moderator Robert Herz, CPA, CGMA, FCA, Former Chair, FASB

Panelists Wesley R. Bricker, Chief Accountant, U.S. Securities and Exchange Commission  
Wayne Carnall, Partner, National Professional Services Group, PWC  
Marsha Hunt, Financial Accounting Standards Board

9:45 - 10:15 a.m. Morning Refreshments, Vendor Displays, and Networking

10:15 - 11:45 a.m. "Financial Reporting Panel" (Continued)

11:45 a.m. - 1:50 p.m. Luncheon Program

"Coping with Current Political, Legislative, and Regulatory Changes"

Harvey Pitt, CEO of the global business consulting firm, Kalorama Partners, LLC

This session includes aspects of the new tax laws, the ongoing tariff wars, cybersecurity, and the need to include so-called critical audit matters in audit reports, among other things.

1:50 - 3:15 p.m. Screening of "All the Queen's Horses" (Award-winning 2017 documentary film showing details of the largest municipal fraud in U.S. history)

Kelly Richmond Pope, Associate Professor, School of Accountancy & MIS, DePaul University

3:15 - 3:35 p.m. Afternoon Refreshments, Vendor Displays, and Networking

3:35 - 4:30 p.m. "All the Queen's Horses" (Continued)

Case Study:

Accounting and auditing lessons learned by understanding the ethical decision-making process and encouraging employees to whistle-blow

4:30 - 4:45 p.m. Wrap Up - Door Prizes



## Student Leadership Conference



***You can expect an outstanding list of presentations.***

***The 2018 conference has these topics:***

Being the Right Hand

Blockchain 101

Career Tracks

CMA Jeopardy

Data Analytics - Transforming Data into Decision Making

Faculty Workshop

Interviewing Skills

Modern Finance - Skills and Tips for Future Success

Navigating the Multigenerational Workforce

Preparing Accountants for the Future

Student Leadership Roundtable

Student Leadership Roundtable

Taking the Work Out of Networking

True Tales from a Business Travel Warrior

#IMASLC18



The Association of  
Accountants and  
Financial Professionals  
in Business

CLEVELAND EAST CHAPTER

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

Page 6

## PRESIDENT'S MESSAGE



Our meeting topic "Dealing with Large Databases" for March is one of the major topics of today according to the accounting departments at John Carroll University and Case Western Reserve University. Hope to see you

there.

We are rebuilding our board. Please contact Ernie Brass if you are interested in serving as a board member of the Cleveland East Chapter Institute of Management Accountants. Email: [bcd\\_net@yahoo.com](mailto:bcd_net@yahoo.com)

### *Spotlight on Board Members*

**E**NRICO VARRICCHIO CURRENTLY serves as Secretary of the Cleveland East Chapter. His past leadership roles with the Chapter include President, Treasurer and Vice President of Administration. He has been an IMA member since 1989 and is appreciative of the many professional and personal relationships he has developed over the years. Enrico is the Director of Finance in the Office of the CFO at Case Western Reserve University. Enrico is encouraged by the influx of young professionals into Chapter leadership roles.



### 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 [cleveastima@gmail.com](mailto:cleveastima@gmail.com)

"Taking Recruiting to a Hire Power!" Honey Wess  
Director

**Honey Wess International**

1990 Case Parkway South  
P.O. Box 699  
Tremburg, OH 44087  
[honey@honeywessintl.com](mailto:honey@honeywessintl.com)

(330)487-5665 Office  
(330)487-5335 Fax  
(216)496-8087 Cell

**Harry Lader, Ph.D.**  
Certified MOS Expert

**microBites™**  
**THE POWER TO SUCCEED™**

c: (216) 521.6650  
e: [Harry@microbites.net](mailto:Harry@microbites.net)  
w: [microbites.net](http://microbites.net)

Microsoft® Office® Training & Consulting  
Specializing in Excel® keyboard shortcuts

**Melissa Shumay**  
Branch Manager  
[melissa.shumay@brunercor.com](mailto:melissa.shumay@brunercor.com)

An affiliate of BrunerCor LLC

6133 Rockside Rd  
Building 2, Suite 403  
Independence, OH 44131

Direct Line:  
(216) 750-6165  
[www.CFStaffing.com](http://www.CFStaffing.com)

Member of the Institute of Management Accountants

**Carlos M. Chavez, MBA, MSA**  
Owner

909 Quincy Court  
Medina, Ohio 44256  
Telephone: (330)723-0559  
Cell: (216)470-4450  
Email: [cmchavezassoc@aol.com](mailto:cmchavezassoc@aol.com)  
[www.chavez2associates.com](http://www.chavez2associates.com)

Deadline for submitting information for next newsletter is the Monday following the technical meeting. Send your submissions to Carol Kuczer [cleveastima@gmail.com](mailto:cleveastima@gmail.com)



The Association of  
Accountants and  
Financial Professionals  
in Business



## *Reasons to join IMA*

### **Chapter activities**

#### **Professional Educational Programs**

Professional Educational Programs combine education, networking, and social activities to help members stay current with the latest in management accounting—and earn NASBA-approved CPE credits. Organized and attended by members at a local level, the meetings feature presentations by local speakers who can tailor topics according to group needs. The smaller size of the meetings allows for a free flow of ideas, and peer discussions further foster knowledge exchange.

#### **Networking Activities**

Networking is an excellent opportunity to make new friends and business contacts and socialize with peers in a relaxed atmosphere. An informal setting can create the right context for mutual help—one person's experience may answer another's problem and vice versa—and give members more exposure to different areas of accounting.

#### **Leadership Training**

Called “the best management training,” leadership activities are open to all members. Serving on a chapter board is an especially good way to experience every phase of management.

#### **Mentorship Initiatives**

Mentoring is a valuable way to inspire and support the next generation of management accountants. By building in-depth relationships with young professionals and students, members can provide seasoned guidance for those aspiring toward the same career path.

#### **Community Service Programs**

Community service programs provide the chance to engage in skills-based and civic-service volunteering. Projects range from consulting for new and growing small businesses to beautification efforts and donor drives in local communities. These programs offer members a way to contribute in an organized and effective manner while developing their own management skills.



The Association of  
Accountants and  
Financial Professionals  
in Business

# IMA ANNUAL CONFERENCE

## SAVE THE DATE



Join us June 15-19, 2019, in beautiful San Diego for expert training, networking, an epic celebration, and spectacular keynote speakers headlined by the one and only...**Jay Leno!**

Registration opens February 13, 2019 with our Early Bird rate of \$1,300 for IMA members.

A savings of \$350. We look forward to seeing you in June!

### Does IMA run in your family? We want to know

In anticipation of our 100-year anniversary celebration coming up in 2019, we are looking for examples of members who have generations (Legacy) in one family as IMA members. Would you please send a message to your chapter members inquiring if there are any Legacy's in their family and if so, to send an email to [communityservices@imanet.org](mailto:communityservices@imanet.org).

### 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





The Association of  
Accountants and  
Financial Professionals  
in Business

## Two IMA Leaders Named to 2019 Top Thought Leaders in Trust

MONTVALE, N.J., Feb. 7, 2019 /PRNewswire/ -- For the first time, Susan E. Bos, CMA, CPA, CFE, board liaison to IMA's® (Institute of Management Accountants) Committee on Ethics, has been named to Trust Across America's 2019 Thought Leaders in Trust list. Jeff Thomson, CMA, CSCA, CAE, president and CEO of IMA was named to the list for the eighth consecutive year and is also a Lifetime Achievement recipient for his continued dedication to supporting his profession and organization by upholding the highest standards of trust. The Trust Across America awards program, now in its ninth year, celebrates professionals who are transforming the way organizations do business.

Bos has been a member of IMA since 1986, currently serving on its Global Board of Directors, the Governance Committee, Ethics Committee, Nominating Committee, IMA's 100-Year Anniversary Committee, and as president of the Stuart Cameron McLeod Society. Her prior volunteer experience within IMA includes multiple terms on the Global Board of Directors, chair of the Ethics Committee, chair of Performance Oversight & Audit, chair of the Women's Leadership Forum and chair of the Finance Committee.

Shortly after assuming his role as president and CEO of IMA in 2008, Thomson introduced IMA's Global Core Values, which have solidified the association's reputation as a trustworthy and valuable business partner. Thomson has led the development of a strategy resulting in IMA crossing the 100,000-member mark for the first time in the organization's history while celebrating its 100-year anniversary this June at the organization's Annual Conference and Expo in San Diego.

"Now more than ever, the finance and accounting profession needs champions – individuals to advocate for professionals as the tides of business change," said Virginia "Ginger" R. White, CMA, CSCA, Chair of IMA's Global Board of Directors. "This recognition reflects Jeff and Sue's dedication not just to IMA, but the profession at large. We're proud to have them as leaders."

Trust Across America previously recognized the late Curtis C. Verschoor, CMA, CPA, who was named to the list for seven consecutive years and was a Lifetime Achievement recipient. Verschoor will be remembered for his many years of service to IMA in various roles including chair of IMA's Committee on Ethics.

About IMA® (Institute of Management Accountants)

IMA®, named the 2017 and 2018 Professional Body of the Year by The Accountant/International Accounting Bulletin, is one of the largest and most respected associations focused exclusively on advancing the management accounting profession. Globally, IMA supports the profession through research, the CMA® (Certified Management Accountant) program, continuing education, networking and advocacy of the highest ethical business practices. IMA has a global network of more than 100,000 members in 140 countries and 300 professional and student chapters. Headquartered in Montvale, N.J., USA, IMA provides localized services through its four global regions: The Americas, Asia/Pacific, Europe, and Middle East/India. For more information about IMA, please visit [www.imanet.org](http://www.imanet.org).



## 2018 - 2019 BOARD OF DIRECTORS

Office	Name
President	Ernie Brass
Secretary	Enrico Varricchio
Treasurer	Jimmy Renz
VP Administration	Marybeth Murphy
VP Professional Education	Ernie Brass
VP Membership	open
Director - Newsletter	Carol Kuczer
Director - Social Media & Publicity	Ashley Hinkle
Director Student Scholarships	open
Director Academic Relations	Zoe Ruolin Yang
Director CMA	Micayla Fern
Chair of the Audit	Vince Pona
Regional Council Delegate	open

Contact board of directors for Cleveland East Chapter at [cleveastima@gmail.com](mailto:cleveastima@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 [cleveastima@gmail.com](mailto:cleveastima@gmail.com).

### Board Meetings

Tuesday, Jun 12, 2018 6 PM in person

Tuesday, Jul 24, 2018 6 PM in person

Tuesday, Aug 14, 2018 6 PM in person

Tuesday, Sep 11, 2018 Noon conference call

Tuesday, Oct 9, 2018 Noon conference call

Tuesday, Nov 14, 2017 Noon conference call

Tuesday, Dec 11, 2017 6 PM in person

Tuesday, Jan 8, 2018 Noon conference call

Tuesday, Feb 12, 2018 Noon conference call

Tuesday, Mar 12, 2018 Noon conference call

Tuesday, Apr 9, 2018 Noon conference call

Tuesday, May 14, 2018 Noon conference call



The Association of  
Accountants and  
Financial Professionals  
in Business

CLEVELAND EAST CHAPTER

# 2018 - 2019 TECHNICAL MEETINGS

EVENTS

Wednesday, August 22, 2018	5:30 PM	Social event at Rock Hall
Tuesday, September 18, 2018	6:30 PM	Employment Opportunities for Accountants at CWRU
Saturday, October 20, 2018	3:00 PM - 5 PM	Student Connection at Whirly Ball
Friday, October 26, 2018	8 AM - 5 PM	Controller's Workshop
Tuesday, January 15, 2019	6:00 PM	Economic Update
Tuesday, February 19, 2019	6:00 PM	Tax Update
Tuesday, March 19, 2019	6:00 PM	Large Data Analysis at JCU
Tuesday, April 16, 2019	6:00 PM	Employment Update or Plant Tour
Tuesday, May 15, 2019	6:00 PM	Ethics - 2 hrs
Thursday, April 25, 2019	8 AM - 5 PM	Annual Meonske Conference Pre-Conference Workshop
Friday, April 26, 2019	8 AM - 5 PM	Annual Meonske Conference

## Member Anniversaries

## IMA GLOBAL CORE VALUES



### Years Members

42	Mario Mulig	
26	James Yates	CMA
26	Renee Lesko	CMA
23	David Boutton	CMA
9	Lisa Sutton	
2	Benjamin Lauer	CMA

### New Members

Michelle Neiser  
Carlye Campanga  
Edwin Heryak  
Emily Haburjak  
Jacob Servidio  
Courtney Wendel

#### *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.

CONGRATULATIONS

## Rethinking Performance Reviews — From Frequency to Format

If you're evaluating your employees' performance only once a year, you're missing out on many opportunities to guide and motivate them. Your team members want to hear from you as often as needed about where they are excelling or should strive to improve. They also want regular reminders that they're an important and valued part of your organization.

So, even if annual performance reviews are a long-standing tradition at your firm, you may want to rethink how often you offer feedback directly to your employees. Performance reviews, conducted formally or informally, are a useful tool for finding out more about the needs and goals of your team.

They also provide an opportunity for you to clarify objectives, review expectations, and identify where, how and why employees may need additional support.

Without regular feedback from you and the chance to make small-scale course corrections, your staff members are not likely to recognize the need to improve their performance. They may not be motivated to stretch their abilities. They also may struggle to see how their contributions help make a difference: More than half of workers (53 percent) in [a Robert Half Management Resources survey](#) reported that they want greater insights into how their duties impact their company's performance.

Also, waiting until the annual performance review cycle to bestow praise on employees who have earned it can undermine morale — and potentially, hurt your firm's [retention efforts](#).

### A new approach to suit new business demands?

Another reason your company may want to re-evaluate the value of the annual performance review process is that you may be operating differently than you did in the past. If your firm is like many businesses, it may no longer have clear annual cycles; instead, it is driven by short-term projects. Rather than setting employee goals 12 months in advance, it may make more sense to come up with milestones for them to achieve throughout the year.

Keep in mind, too, that creating a continuous feedback loop doesn't just benefit your employees. It can save you time once you adapt to the new process. You may find it's much easier to fit in short, casual employee reviews sprinkled throughout the year than carving out one large chunk of time to prepare for and conduct formal performance evaluations for your entire team.

More than one-third (36 percent) of human resources (HR) managers polled for [a Robert Half survey](#) said their company is increasing the frequency of performance reviews. While 40 percent of respondents said these appraisals still happen annually, 28 percent report that they are conducted twice a year at their

## **Rethinking Performance Reviews — From Frequency to Format - *continued***

company and 10 percent said they take place quarterly. And 14 percent of HR managers surveyed said their organizations conduct these reviews as needed.

If you decided to change the frequency of your performance reviews, make a point to rethink your overall process as well. Here are some strategies for success:

### **Make it a discussion**

Remember that employees can find performance reviews — even informal check-ins — intimidating. That's why it's important to structure these meetings like two-way conversations. You want to share your feedback, but you also want to invite your employee to respond to it. You also want to create an environment where staff members feel they can be open and honest with you, too.

*For tips on fostering a positive workplace culture, [read this special report from Robert Half](#).*

So, listen more and talk less. Instead of telling employees how they rated in certain areas and why they received the scores they did, turn the process upside down. Ask your workers to talk about their strengths and weaknesses, and to offer suggestions for both personal and department-wide improvement. And be sure to listen for hints as to their level of workplace happiness and satisfaction.

### **Focus on the future**

Instead of dwelling on past successes or failures in a performance review, focus on the company's upcoming needs and how the employee fits into that big picture. For example, what technical training do your financial analysts need to make the most of the new [cloud-based software](#) your organization has implemented?

For your rising superstars, discuss mentoring and leadership training. Also, you may find these one-to-one meetings can help you identify candidates that are a good fit for the organization's succession planning objectives. Only about half (52 percent) of chief financial officers in [a recent Robert Half Management Resources survey](#) said they had already found a potential successor for their position.

### **Address upskilling**

During more frequent performance review meetings, you can help employees more clearly identify areas for professional growth, such as the need to enhance specific skills or learn new ones. [Upskilling](#) is especially important today as technology continues to change how we work.



## Rethinking Performance Reviews — From Frequency to Format - *continued*

Research conducted for [Benchmarking Accounting and Finance Functions: 2018](#), a special report from Robert Half and [Financial Executives Research Foundation \(FERF\)](#), finds that many firms are expanding their use of automation and cloud computing. As they do, they need support from workers who have experience with data analytics, enterprise resource planning (ERP) systems, and more.

Upskilling is also important for recruiting and retaining millennial professionals: These workers are unlikely to be satisfied in their jobs if they're not offered [meaningful opportunities to learn](#).

### Separate goal-setting and salary discussions

Many companies base financial rewards — annual or biannual bonuses, merit increases, retention bonuses — on formal evaluations. That doesn't need to change, although you may want to consider separating that conversation from the feedback process. The performance review is a time to acknowledge employees' strengths and discuss strategies for positive change and growth.

As a financial manager, your aim is to foster a healthy relationship with your staff and motivate them to do their best work, of course. But all too often, the annual performance review is counterproductive to that goal. Right or wrong, many workers dread these appraisals because they see them as a way for management to call attention to their shortcomings.

In this new year, consider upending this old-fashioned power dynamic by rethinking your approach to evaluating your team members' performance. More frequent feedback for your staff and a less-structured format for [delivering constructive criticism](#) and praise can help keep your team focused on continuous improvement.

*Accountemps, a [Robert Half](#) company, is the world's first and largest specialized staffing firm for temporary accounting, finance and bookkeeping professionals. Accountemps has more than 300 locations worldwide. More resources, including job search services and [career advice](#), can be found at [roberthalf.com/accountemps](http://roberthalf.com/accountemps).*

###



IMA's Certification for  
Accountants and  
Financial Professionals  
in Business

## 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

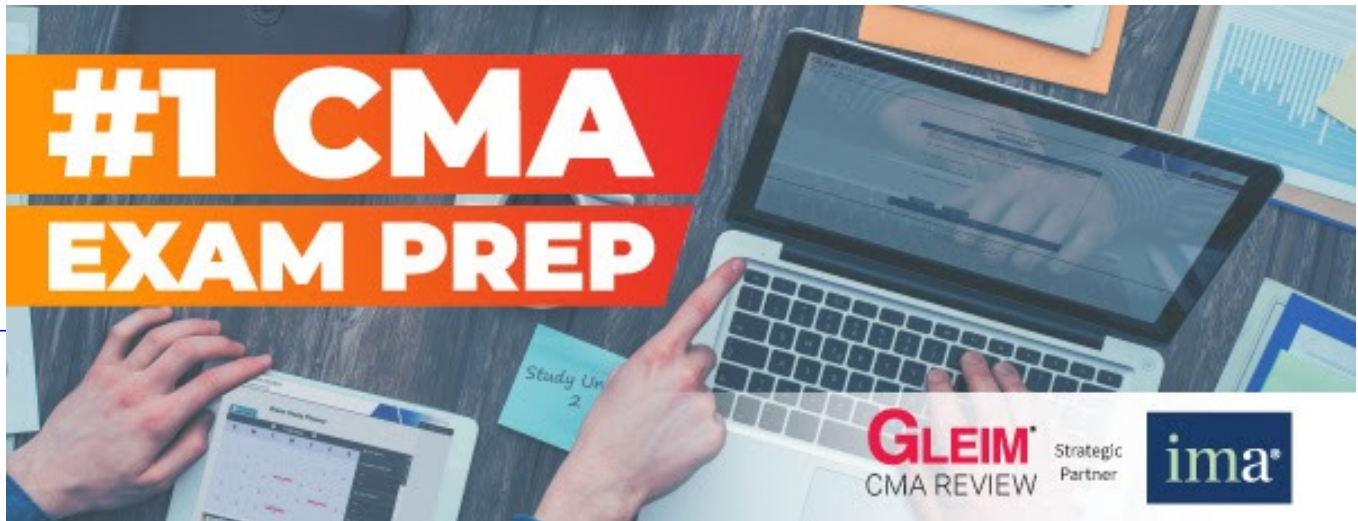
Prove your ability to become a strategic business partner, while you also enhance your self-confidence, your sense of accomplishment, and your resume.

### 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**



**MAKE 2018 YOUR YEAR TO BECOME A CMA!**

Gleim set the standard with the first CMA course over 35 years ago. Today, Gleim is still trusted to provide you with everything you need to pass the CMA exam.

**SAVE 10% NOW ON THE #1 CMA REVIEW COURSE**



**WHY GLEIM CMA IS #1**

- Unmatched results
- Largest test bank of exam questions
- Complete coverage of ICMA LOSs
- Unparalleled support from team of exam experts
- No-hassle Access Until You Pass® guarantee

**SAVE 10% NOW!**

We look forward to helping you pass the CMA Exam. Team Gleim 800.874.5346

[accountingteam@gleim.com](mailto:accountingteam@gleim.com) Gleim Publications, Inc., 4201 NW 95th Blvd, Gainesville, FL 32606



IMA's Certification for  
Accountants and  
Financial Professionals  
in Business

### ***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.







The Association of  
Accountants and  
Financial Professionals  
in Business

# 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

Wore Giotta,  
Community Relations Associate of  
East Coast Chapters  
IMA  
10 Paragon Drive  
Montvale, NJ 07645-1718  
Telephone (800)638-4427  
Email: [WGiotta@imanet.org](mailto:WGiotta@imanet.org)  
IMA Website: [www.imanet.org](http://www.imanet.org)

## 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



Page 19

# 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 -

- **Top 10 ERP Selection and Implementation Lessons Learned**

Inside Talk February 27, 2019 01:00 PM - 02:00 PM

- **Leading Change**

Leadership Academy March 05, 2019 01:00 PM - 02:30 PM

- **Data Analytics - Exposing the Organization to Finance's Value**

Inside Talk March 11, 2019 01:00 PM - 02:30 PM

- **Finance Meetings: How to Power Up with Real-Time Data**

Inside Talk - March 27, 2019 01:00 PM - 02:00 PM

### 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

### Webinar Archives

IMA Members: Play past webinars on LinkUp IMA

**For all CPE, login at [www.imanet.org](http://www.imanet.org)**



The Association of  
Accountants and  
Financial Professionals  
in Business

# GLEIM

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

Page 20

## Continuing Professional Education

**G** **LEIM** HAS RECENTLY added the following courses to our Online CPE catalog:

- Accounting for Investments
- Estates, Trusts, and Wealth Transfer (2018)
- Ethics in Tax Practice
- Firm's Cost of Capital and Short-Term Financing
- Individual: Itemized Deductions (2018)
- Internal Auditing: Audit Evidence and Documentation
- Internal Auditing: Charter, Independence, and Objectivity
- Internal Auditing: Communicating Results
- Internal Auditing: Nature of Work, Governance, and Compliance
- Overview of the Sarbanes-Oxley Act and the Public Company Accounting Oversight Board
- Reporting Income from Debt Cancellation (2018)
- Schedule C Hot Spots: Sole Proprietors (2018)
- Self-Employed Payroll Hot Spots: S Corporation and LLC Compensation (2018)
- Staying Current with Tax Laws: Federal Tax Update (2018)
- The New Section 199A: Qualified Business Income Deduction

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=-OIE4745p1S5wbqCzaalNe21NrKk14FraizFYWC6vg&r=hN\\_Q\\_lxkNLNqftkxgPhSGw&m=UhKckYuhxF5XPQvtQsX7D6NBeoFCKAA1zp47TKyCvKg&s=8CCIKa6WFILPU8irRZyIPQqmU6TrEOvbJeZ8dC8KTWY&e=](https://urldefense.proofpoint.com/v2/url?u=http-3A_www.gleim.com_accounting_cpe&d=DwIFAg&c=-OIE4745p1S5wbqCzaalNe21NrKk14FraizFYWC6vg&r=hN_Q_lxkNLNqftkxgPhSGw&m=UhKckYuhxF5XPQvtQsX7D6NBeoFCKAA1zp47TKyCvKg&s=8CCIKa6WFILPU8irRZyIPQqmU6TrEOvbJeZ8dC8KTWY&e=) .

Debbie Martin  
Senior Sales Consultant  
Gleim Publications Inc.

[Debbie.Martin@gleim.com](mailto:Debbie.Martin@gleim.com)  
352.375.0772 Ext. 414  
800.874.5346 Ext. 414  
352.375.6940 FAX  
Hours Mon-Fri 8am-7pm EDT

Please visit our home page.

[https://urldefense.proofpoint.com/v2/url?u=http-3A\\_www.gleim.com\\_&d=DwIFAg&c=-OIE4745p1S5wbqCzaalNe21NrKk14FraizFYWC6vg&r=hN\\_Q\\_lxkNLNqftkxgPhSGw&m=UhKckYuhxF5XPQvtQsX7D6NBeoFCKAA1zp47TKyCvKg&s=BiYNEH9KD9fbJbZqMG6895Hc5HshACwWffSE8nNOAQ8&e=](https://urldefense.proofpoint.com/v2/url?u=http-3A_www.gleim.com_&d=DwIFAg&c=-OIE4745p1S5wbqCzaalNe21NrKk14FraizFYWC6vg&r=hN_Q_lxkNLNqftkxgPhSGw&m=UhKckYuhxF5XPQvtQsX7D6NBeoFCKAA1zp47TKyCvKg&s=BiYNEH9KD9fbJbZqMG6895Hc5HshACwWffSE8nNOAQ8&e=)