

Cleveland East Chapter of IMA

Annual Controller's Workshop



Controller's Workshop

BASF

23700 Chagrin Blvd
Beachwood, OH
Friday, October 26th
8:00 am – 4:30 pm

A one day seminar for
Controllers, CPAs, CMAs,
CFMs and Accountants
interested in staying up to
date on topics of interest
or new rules and laws.

- Importance of D & I in the Workplace
- Continuous Improvement
- Data Analytics and Excel Power Query
- Budgeting
- Tax Update

[Register online today](#)

(click the link to the online registration to register for the event)

Cost: \$125

SEMINAR OUTLINE

7:30 Continental Breakfast sponsored by



8:00 **The Value of Diversity & Inclusion (D&I) in the Workplace**

Brad Monterio, Chair, IMA Diversity & Inclusion Committee

Paul Myers, Chair Outreach Working Group, D&I Committee

- Learn about diversity, inclusion and their differences
- Understand how inclusion amplifies diversity
- See the linkages between D&I, innovation and growth
- Gain insight into D&I best practices

9:30 **Achieving Sustainable Continuous Improvement**

Gabe Zubizarreta, Principle Silicon Valley Accountants

Learn how to react to changes in ways that create opportunities for continuous improvement, compliance, change management, and cohesive and collaborative cross-departmental interaction.

- Recognize the ways habits significantly influence their reaction to change
- Identify the linkage between reactions to change from external sources to the way someone leverages the change.
- Describe techniques to create opportunities for continuous improvement, improved compliance, and proactive change management.



11:00 **Introduction to Data Analytics and Excel Power Query**

Don Tomoff, founder Invenio Advisors LLC

In this session we will explore the basics of Power Query add-in—extracting, transforming and preparing data for analysis.

- Import and transform basic data into Excel using Power Query
- Understand and apply the data load capabilities of loading into Excel versus loading into the “data model”, and why it matters.
- Transform data and add extra fields to the data set to drive increased data flexibility for analysis.



12:00 **Lunch - provided**

1:00 **Budgeting Methods Discussion - Trends & Best Practices**

Tom Reynolds, Senior Budget Analyst and Adjunct faculty Tri-C and Cleveland State

- Let Excel Go
- Forecasting Improvement Techniques
- Benefits for system improvements
- Discussion of Change Methodology



2:45 **What does the Tax Cuts and Jobs Act mean for corporate and pass-through entities?**

Tammy Greber, Senior Tax Manager at RSM US LLP

The Tax Cuts and Jobs Act includes sweeping changes to the tax law. Get an understanding what to expect and the potential impact to your tax planning process.



Program Speakers

Brad Monterio

Brad Monterio is managing director of Colcomgroup, Inc., where he advises organizations about strategy around the intersection of technology, business, and accounting/finance. A former investment banker, Monterio began his career in marketing and product development positions at Chase Manhattan Bank. An active IMA volunteer, Monterio is a 2018-2020 Global Board Member and a member of the Governance Committee. He has also served as a Global Board Member from 2010-2016 and is a past member of the Planning and Development and Nominating Committees. Brad currently chairs the IMA Diversity and Inclusion (D&I) Committee and is senior advisor/past chair of the IMA Technology Solutions & Practices (TS&P) Committee. Monterio regularly speaks, writes, and blogs about D&I, technology, corporate disclosure, data governance, integrated reporting, and other topics. He received his Bachelor's degree from Dartmouth College in 1988, speaks French and is an avid traveler.



Paul Myers

Paul Myers is the Director of Finance with State of the Heart Care hospice in Ohio. He has also held accounting and finance leadership roles with Datwyler, State of Ohio, ITW Food Equipment and Standard Register. Paul has held various volunteer positions with IMA with the Dayton Chapter and the Ohio Council, and he served on the IMA Global Board of Directors. He has been serving on the Diversity and Inclusion Committee for the last several years. He received the IMA Champion Award in 2018.



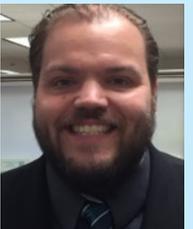
Gabe Zubizarreta, CPA

Gabe Z. is a founding Principle, Silicon Valley Accountants ("SVA"), is a CPA with over 20 years' experience, ranging from Senior Auditor Manager of PwC to founder of his own CPA firm where the services are always guaranteed. Since founding SVA in 2008, Gabe primarily focuses on financial effectiveness; he also advises clients on financial reporting matters, assisting with mergers and integrations, as well as Sarbanes-Oxley compliance processes. Recently, he has collaborated with Hyland Software on the development of the OnBase Accelerated Financial Reporting Management (AFRM®) module which serves as a technology platform for the optimization of the accounting close and financial reporting processes, which has become a primary focus of the firm.



Don Tomoff, CPA

Don is the founder of Invenio Advisors LLC, a consulting firm specializing in information management, process improvement, reporting and data analysis, as well as education and training. Don's experience includes "Big 4" public accounting, senior-level industry finance positions, and consulting. Don's recent industry experience includes serving eight years with Jo-Ann Stores as VP, Finance and Treasurer. For the last few years, Don has worked with executives and companies on many process improvement, reporting and training initiatives, including developing and implementing mobile information strategies. His efforts are focused on three fronts – simplify, improve and innovate – through understanding trends, identification of process improvement opportunities, and the leveraging the available technology tools to drive change. In addition to consulting on technology trends, digital / mobile initiatives and executive training, Don has been a featured speaker on mobile, technology and disruption topics at various conferences



Tom Reynolds, MBA, MPA, SPHR, EA

Tom currently works full-time for Cuyahoga Community College (Tri-C) in Cleveland, OH as a senior budget analyst in the Department of Planning, Budget, and Strategic Support. He also teaches courses part-time at the college-level. He is currently teaching taxation at Tri-C, budgeting classes at Cleveland State University's Professional Development Center, and budgeting classes at Tri-C's Corporate College. Previous to working in higher education, Tom worked as a city administrator for communities in Ohio and Wisconsin. He also has experience working as an accountant and tax specialist for a local CPA firm.



Tammy Greber, CPA

Tammy is Senior Tax Manager at RSM US LLP of the firm's federal tax practice since 2005 specializing in real estate and service industries in Ohio. She has over 20 years of experience in public accounting overseeing the tax preparation and review process for federal and multi-state tax compliance filings for numerous real estate, manufacturing, service and distribution industry clients. Tammy has worked on consolidated entities; merger integration issues; stock and asset acquisitions; state and local nexus issues; estate planning for high net-worth individuals and closely held businesses; and employee benefit plans. Tammy provides a variety of tax planning and consulting services to clients selling their real estate properties, selling or transferring their partnership interests, advising and reviewing 1031 exchange transactions, and restructuring their portfolios. She works with clients to minimize taxes, effective planning and use of real estate incentives such as low-income housing credits, historic tax credits and easement contributions.