



The Association of
Accountants and
Financial Professionals
in Business

CLEVELAND EAST CHAPTER

INSTITUTE OF MANAGEMENT ACCOUNTANTS

NOV 2019



Insiders
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www.cleveast.imanet.org



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Student Leadership Conference

November 14-16, 2019

The Westin Charlotte, North Carolina

Registration open



Controller's Workshop

Friday, November 22

8:00 AM to 4:30 PM

BASF, 23700 Chagrin Blvd., Beachwood, OH

Continental Breakfast and Lunch provided

Register on the website:
cleveast.imanet.org



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Jan 21 - Economic update

Feb 18 - Charity Event: Food Bank

**June 21-24 2020 IMA Annual
Conference & Expo (ACE2020)
Atlanta Marriott Marquis**



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Current technical meeting

Cleveland East Chapter of IMA Annual Controller's Workshop

Controller's Workshop

BASF

23700 Chagrin Blvd

Beachwood, OH

Friday, November 22nd

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.

- Blockchain
- Tax Update
- Excel, PowerBI, Data Analysis
- Role of the Mgt. Acct.
- Ethics
- Performance Appraisal

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

Accountemps
A Robert Half Company

8:00 **What is Blockchain and how does it work?**

Dr. Charles Dull, Associate Dean for IT
Center of Excellence at Cuyahoga Com-
munity College



- However, is it the right decision for every business? What would a decision process look like for determining if Blockchain was right for you? During this presentation we will take a look at how you might develop a decision process for potential adoption

9:30 **Tax Update**

Tammy Tran- Sr. PCX Dept, Cohen & Co
Alex Huff—Manager A&A, Cohen & Co



- Meals and Entertainment – Breaking it Down
- Bonus/\$179 Depreciation Changes in Perspective
- Ohio Budget Bill Highlights
- Wayfair - Sales and Use Tax Refresher
- Lease Standards – Changes, Updates, and Hot Topics

Break—Sponsored by **KELLY** financial resources

11:00 **Excel, PowerBI and Data Analysis—
Eliminating the Paralysis of the Analysis**

Don Tomoff, founder Invenio Advisors LLC



- Explain the Excel "power tools" and better understand the capabilities of "modern" excel
- Understand how Excel and PowerBI, although separate platforms, are integrated and complementary tools
- Explain the process of "ELTR" in data analytics—Extract, Transform, Load and Report

12:00 **Lunch - provided**

12:45 **Role of Management Accountants in Pow-
ering Organization Behavior**

Gaby Lahoud, Serenity Advisors—Consulting Firm, IMA Board Mem-
ber

- What is organization behavior?
- Influence of the organization culture on the accounting and finance departments
- The role of management accountants in reshaping the organi-
zation behavior for a more effective and efficient decision-
making process
- How a powered culture can turn a management accountant
into a strategic partner

2:00 **Ethics**

Marybeth Murphy - Assistant Professor of Accounting, Hiram Col-
lege

- Case study analysis

3:00 **Why Everyone Hates Performance Ap-
praisals, and What's Next?**

Jim Smith—The Executive Happiness Coach®



- Understand why current one-way, top-
down Performance Management (PM)
systems do not and cannot ever work well
- Experience a reverse feedback process with the potential to shift
responsibility for PM
- Learn a balanced feedback model based in Appreciative Inquiry
- Review findings from Positive Psychology about context and
feedback
- Leave with tools and data to support a redefinition of PM sys-
tems in their organizations

Register on the website:
cleveast.imanet.org

Student Leadership Conference



Embrace Your Future

November 14-16, 2019 | The Westin Charlotte

Registration open

You can expect an outstanding list of presentations.

Why attend SLC2019?

Jump-start your journey from the classroom to the boardroom

Learn about the latest trends in the profession from inspiring speakers

Build your network of contacts and engage with like-minded students from around the world

October meeting photos



Students learn about the IMA and CMA



Dennis Rarick teaches students



Accounting students share thoughts



Dale Kime (Kelly Financial Services) welcomes students



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CLEVELAND EAST CHAPTER

PRESIDENT'S MESSAGE



I WISH I COULD say October brought us good news. However, I am regret to inform the Chapter that Ernie Brass passed away at the beginning of the month. Ernie without a doubt loved the IMA and being a part of the Cleveland East Chapter. During his several decades of involvement, he held numerous positions and even served as the Chapter's president on several occasions. He brought an incomparable level of passion to all of the chapter's events.

As a college professor he saw the potential in students and encouraged them to join and participate in the IMA. These students blossomed into amazing ambassadors for the organization and profession. In the coming months the chapter will work to develop a program to ensure a lasting memorial for Ernie. We will all keep Ernie and his family in our prayers.

THE CHAPTER HOSTED its Student Night with Hiram students on October 22nd. Our very own Dennis Rarick gave the students a fantastic presentation of the IMA and the CMA. This provided these future accountants with an opportunity to hear the benefits that the organization and certification can provide. Then Dale Kime from Kelly Financial Services provided the students with advice regarding the hiring process. This advice included areas ranging from creating a resume to the final step during any job interview. The students and board members enjoyed several games of Whirlyball. I would like to thank the two speakers and the entire board for helping to make this event a success.



Present more Effectively

And earn CPE credits as you learn!

Successful Public Speaking Seminar

This 1-day seminar will help you move from novice to skilled, after learning tips from the tried-and-true expert in public speaking – Dale Carnegie.

Friday, November 8, 2019 | 9:00 am-4:00 pm | CEA, 950 Keynote Circle #10, Brooklyn Hts. 44131

Tuition \$249 includes lunch – eligible for **9 CPE credits** through NASBA

Dale Carnegie Course - Westlake, Middlefield and North Olmsted this fall

Our world-famous course helps you enhance your professional skills in communications, leadership, and conquering stress and worry. Offered in 8-evening or 3-day formats.

Westlake: Free preview **October 7** at 6 pm; Class starts **October 21** 6:00-9:30 PM; 8 Monday evenings – 33 CPEs

Middlefield: Class starts **October 17**, 6:00-9:30 PM; 8 Thursdays, skipping Halloween and Thanksgiving – 33 CPEs

North Olmsted: 3-day Immersion **November 7, 14, 21** – 8:30 am-5:00 pm all three days – 28 CPEs

Akron: Free preview Tuesday, **January 21** at 6 pm; class target **February 7**, 6-9:30 pm; 8 Tuesday evenings – 33 CPEs

Tuition \$1,995 – eligible for CPE's and college credit, payment plans and makeup sessions

neohio.dalecarnegie.com | 216.223.7733

Marilee.MacAskill@dalecarnegie.com





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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.



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IMA ANNUAL CONFERENCE

SAVE THE DATE



Don't miss IMA's Annual Conference & Expo in Atlanta! In addition to networking with attendees from around the world, you can enhance your knowledge by attending relevant sessions and earn valuable CPE credits.

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



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IMA Launches Global Ad Campaign to Highlight Importance of Certification in Today's Business Landscape

Montvale, N.J., September 16, 2019 – Today, **IMA®** (Institute of Management Accountants) launched a new global, integrated advertising campaign in support of the **CMA®** (Certified Management Accountant) certification program. The advertisements emphasize how accounting and finance professionals who earn the CMA are better positioned to advance their careers and obtain more strategic roles, through greater expertise and confidence.

With **new reports** showing that certification provides advantages for accounting and finance professionals, the most effective way for management accountants to develop the skills necessary to progress in the profession is through a CMA certification. In a comedic but relevant take on this theme, the campaign highlights different aspects of why a CMA certification is valuable and can connect the dots for a professional to add value to an organization and advance their careers. The anchor television spot is accessible here: <https://www.youtube.com/watch?v=KflcYqpDoDA>.

“Earning the CMA certification is not just about staying relevant in today’s digital workplace, it is about thriving in it,” said Jeff Thomson, CMA, CSCA, CAE, IMA president and CEO. “Management accountants who have an understanding of advanced technologies and strategies will excel as the profession moves forward, and the CMA certification allows them to reach that potential. As a global association, we hope this campaign educates professionals on the importance of CMA certification in developing the skills necessary to succeed both today and in the future.”

The multi-channel campaign was developed in partnership with The Gate | New York, an international advertising agency and marketing services company, for the fourth consecutive year. The campaign utilizes television, print, digital, social media, and search engine marketing, including six spots to be aired on television.

“For this year’s campaign, we started with a simple truth: ambitious accountants would rather connect the dots than count them,” said David Bernstein, chief creative officer, The Gate | New York. “Which means they need to earn their CMA. But how do you break them out of their inertia? We empathized with their frustration by visualizing a handful of idioms. Like having a ‘low ceiling on your career,’ ‘pounding your head against the wall,’ ‘wanting to crawl under the table’ when you don’t know the answer to your boss’ question and, from the positive perspective, having the knowledge to ‘blow people away with your insights.’”

The campaign’s themes reflect insights obtained from focus groups, which found that management accountants benefit from a CMA certification through their gained ability to think strategically and confidence to make smart decisions that impact the company. As a gateway for finance professionals to move into more strategic roles, the CMA demands a mastery of the 12 most crucial practice areas in management accounting, including planning and analysis, performance management, and risk management.

Additionally, **changes to the CMA exam** will take effect in 2020 to account for technology and analytics, and strategic decision-making, allowing CMAs to sharpen their skills as they move into the digital age. To learn more about the CMA, visit: <http://www.imanet.org>.

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) and CSCA® (Certified in Strategy and Competitive Analysis) programs, continuing education, networking, and advocacy of the highest ethical business practices. IMA has a global network of more than 125,000 members in 150 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 <http://www.imanet.org>

About The Gate | New York

The Gate | New York is part of The Gate Worldwide, an international agency network known for making considered purchases worth considering. Our panel of consumer, cultural and category experts helps us identify a client’s “Why Axis”: *why* customers should choose their product or service over someone else’s. This expertise has led to successful communication programs for clients in finance, consumer goods, luxury, insurance, mining, energy and more. The Gate manages over \$250 million in client advertising and has a network of offices in New York, London, Edinburgh, and Shanghai. For more information, visit <http://thegateworldwide.com>



2019 - 2020 BOARD OF DIRECTORS

Spotlight on board members



For your leadership, volunteerism and commitment to serving the IMA professional community.

Office	Name
President	James Renz
Secretary	Dennis Rarick
Treasurer	Micayla Fern
VP Administration	Marybeth Murphy
VP Professional Education	open
VP Membership	open
Director - Newsletter	Carol Kuczer
Director - Social Media & Publicity	Sandra Brenner
Director Student Scholarships	Robin Klaco
Director Academic Relations	open
Director CMA	open
Chair of the Audit	Vince Pona
Regional Council Delegate	Sandra Brenner
Liaison	Enrico Varricchio

Contact board of directors for Cleveland East Chapter at cleveastima@gmail.com



Ernie Brass

With great sadness, we announce the passing of Ernie Brass who has been a long time member and board member of IMA. As our current president noted in his message about our past president,

I wish I could say October brought us good news. However, I am regret to inform the Chapter that Ernie Brass passed away at the beginning of the month. Ernie without a doubt loved the IMA and being a part of the Cleveland East Chapter. During his several decades of involvement, he held numerous positions and even served as the Chapter's president on several occasions. He brought an incomparable level of passion to all of the chapter's events. As a college professor he saw the potential in students and encouraged them to join and participate in the IMA. These students blossomed into amazing ambassadors for the organization and profession. In the coming months the chapter will work to develop a program to ensure a lasting memorial for Ernie. We will all keep Ernie and his family in our prayers.

Board Meetings

Tuesday, Jun 11, 2019 6 PM in person
 Tuesday, Jul 16, 2019 6 PM in person
 Tuesday, Aug 13, 2019 6 PM in person
 Wed Sep 11, 2019 Noon conference call
 Wed, Oct 9, 2019 Noon conference call
 Wed, Nov 13, 2019 Noon conference call
 Tuesday, Dec 10, 2019 6 PM in person

Wed, Jan 8, 2020 Noon conference call
 Wed, Feb 12, 2020 Noon conference call
 Wed, Mar 11, 2020 Noon conference call
 Wed, Apr 8, 2020 Noon conference call
 Wed, May 13, 2020 Noon conference call



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CLEVELAND EAST CHAPTER

2019 - 2020 TECHNICAL MEETINGS

EVENTS

Wednesday, August 21, 2019	6:00 PM	Social event at Lake County Captains
Tuesday, September 17, 2019	6:00 PM	Board Governance and Investor Communications
Tuesday, October 22, 2019	6:00 PM	Student Night - Brand Awareness
Friday, November 22, 2019	8 AM - 5 PM	Controller's Workshop
Tuesday, January 21, 2020	6:00 PM	Economic Update
Tuesday, February 18, 2020	6:00 PM	Charity event - Greater Cleveland Food Bank
Tuesday, March 17, 2020	6:00 PM	Big Data, Data Analytics
Tuesday, April 21, 2020	6:00 PM	Risk Mitigation and Internal Controls
Tuesday, May 19, 2020	6:00 PM	Accounting for & at the Cleveland Metroparks



Member Anniversaries

IMA GLOBAL CORE VALUES

New Members

Olivia Spearman

Years

Members

CMA	30	Timothy Murphy
CMA	18	Philip Weihe
	18	Dale Kime
CMA	12	Michael Newkirk
CMA	9	Mark Rice
	9	Amanda Armeni
	5	Edward Niedoba
	4	Micayla Fern
	1	Elan Schwartz

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

5 Ways to Upskill Your Team and Prepare Them for the Future of Work

EMERGING TECHNOLOGIES, LIKE artificial intelligence (AI), are changing the nature of work — and opening the door to greater employee productivity. Accounting and finance functions are feeling this wave of change acutely: According to research for Robert Half's Jobs and AI Anxiety report, technological advancements are causing finance and accounting positions to evolve rapidly, leading to the demand for new skills.

For finance leaders, the opportunity — and challenge — is to make the best use of talented team members who will have more time to devote to more important, strategic and value-adding work for the business. Advanced technology tools are already helping to free many workers from the burden of routine and time-consuming tasks. That's why it's critical for finance leaders to take action now to upskill their staff. The good news: You'll likely find your employees are ready and willing to grow their skills and knowledge.

Eighty-three percent of accounting and finance managers surveyed for the Jobs and AI Anxiety report say they believe their employees are eager to learn about new technologies. And 81% of those leaders say they expect their employees will be quick to adapt to new technologies that are introduced into the workplace.

Types of tech many finance pros may need to learn The Jobs and AI Anxiety report makes the point that we're only at the starting gate with many of the transformative technologies coming into the workplace. So, it's not too late for anyone to build new skills and gain an understanding of emerging tech. Some examples of the technologies that finance and accounting professionals will soon be working with, if they aren't already, include:

- Robotic process automation (RPA) tools
- AI software that adds a "human" element to tasks such as risk assessment or fraud detection
- Machine learning (ML) or self-editing software
- Natural language processing (NLP) programs that translate documents and speech into data

Also, don't forget about technologies that many accounting and finance functions already use — which your team may not yet be working with or could learn to use at a more advanced level. Big data and advanced analytics are a prime example. Forty-two percent of accounting and finance managers surveyed for Robert Half's Jobs and AI Anxiety report said their functions currently use analytical tools, such as predictive analytics, and another 27% expect to use them within the next three years. And for many accounting and finance roles, these skills are becoming must-haves, our research shows.

5 Ways to Upskill Your Team - continued

How to upskill your finance and accounting employees

So, now that you recognize the urgency of preparing your team for the future of work, and the types of technologies they may need to understand (at least, at a high level), where do you start with upskilling them? The following approaches can be effective, as well as budget- and schedule-friendly:

1. Microlearning

Upskilling doesn't have to mean months-long courses and new certifications. It can be done gradually. Start with a 10-minute video tutorial on a cool new feature of a program that employees already use, for example. Then add more experiences like this throughout the year.

2. Virtual training

Pulling employees from their to-do lists to sit through tedious lectures or workshops can lead to frustration and deflated morale. Instead, offer hands-on training via an online platform that workers can access remotely on their own time.

3. Mentoring

Do some of your employees already use new technologies? Pairing them up with other team members through mentoring arrangements or offering job shadowing opportunities is an easy yet highly effective approach to upskilling. As a bonus, your tech-savvy employees may be able to teach their mentors a thing or two as well.

4. Peer-to-peer (P2P) learning

Building on the last point: You may want to give P2P learning a try at your firm. P2P learning has long been used in the academic world, but in recent years, has been embraced by many leading businesses as a cost-effective tool for upskilling workers. P2P learning is informal, and takes many forms, including employee-led workshops and team projects.

5. Providing financial aid

Despite the value of the methods described above, not all new technologies and skill sets can be mastered in a quick session or through an online tutorial. If you know your finance team will eventually require certification or in-depth study of a new subject, consider offering tuition reimbursement or assistance.

5 Ways to Upskill Your Team - continued

Don't forget about soft skills

Most employers interviewed for the Jobs and AI Anxiety report said that soft skills will be the most valuable skills in the workplace of the future. After all, machines can't replicate everything — especially uniquely human qualities, like the ability to show empathy.

The report also predicts that future workplaces will be highly collaborative, and that many businesses will expand their use of remote teams. That means excellent communication skills will be even more important than they are today. So, try to connect your team members with professional development options that will help them to build and master abilities such as written and verbal communication, emotional intelligence, and leadership.

Upskilling your team is just as important to your company's long-term competitiveness as is investing in new technologies. Upskilling can also enhance staff retention, if you do it well. Don't make your employees come to you first. Approach them and explain the digital journey your organization is embarking on — or plans to pursue soon — and the role they can play in it. Proactively encouraging your team to consider professional development around new technologies shows you are invested in their success — and support their efforts to future-proof their careers.

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.



IMA's Certification for
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CMA CERTIFICATION

THE GOLD STANDARD

Part 1: Financial Planning, Performance, and Analytics

- 15% Cost Management
- 15% Internal Controls
- 15% Technology and Analytics
- 15% External Financial Reporting Decisions
- 20% Planning, Budgeting, and Forecasting
- 20% Performance Management

Part 2: Strategic Financial Management

- 10% Risk Management
- 10% Investment Decisions
- 15% Professional Ethics
- 20% Financial Statement Analysis
- 20% Corporate Finance
- 25% Decision Analysis

Salary

Findings of IMA's Annual Salary Survey indicate that professionals holding IMA's CMA certification have greater earning power in total compensation than their non-certified colleagues.

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.

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.

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.

The Exam is Changing In 2020!

ICMA® (Institute of Certified Management Accountants) recently undertook a comprehensive job analysis to ensure that topics on the CMA® (Certified Management Accountant) exam continue to be current, relevant and valid. Changes to the exam as a result of this survey can be found below. The changes to the CMA exam take effect on January 1, 2020.

Key Changes to Expect

Part 1:

Technology is transforming the profession, and we want our CMAs to be prepared. Part 1 of the CMA exam will include a new section on Technology & Analytics.

New Title: Financial Planning, Performance, and Analytics

New Content: Technology and Analytics, Integrated Reporting

Deleted Content: Internal Auditing

Part 2:

Being able to apply an ethical and strategic framework to decision-making in a complex, digital world is a skill every accounting and finance professional needs to have. Part 2 of the exam will expand the Professional Ethics and Decision Analysis sections.

New Title: Strategic Financial Management

New Content: Business Ethics, Sustainability and Social Responsibility

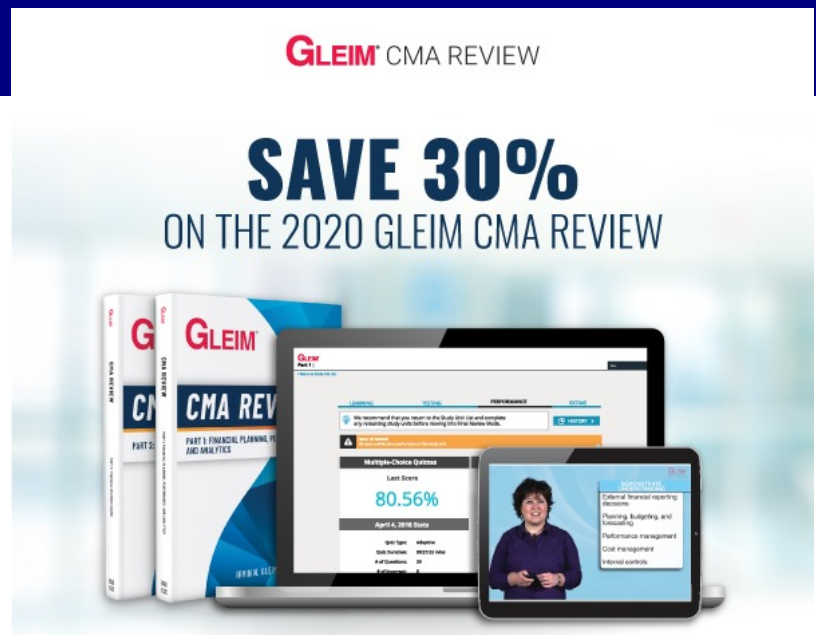
Deleted Content: Off-Balance Sheet Financing, Bankruptcy, Tax Implications of Transfer Pricing

See more at: imanet.org/2020exam

It's time to preorder!

The latest edition of Gleim CMA Review covers the 2020 exam changes, and we're helping you get started by offering

SAVE NOW
[\[mmsend88.com\]](https://mmsend88.com)



Our 2020 edition is updated with:

100% coverage of the new 2020 CMA exam

- Including topics such as Technology & Analytics, Integrated Reporting, and Business Ethics

SmartAdapt™ guided review technology

- Helps you study smart by eliminating the guesswork with a personalized learning path for the most effective studying

Even more videos

- Additional hours of Gleim Instruct professor-led lectures, which cover the toughest topics and provide walkthroughs of practice questions

More user-friendly books and online platform

- Enhanced to provide a more accessible and intuitive learning experience

Plus everything our candidates already love, including:

- The best bank of exam-quality practice questions and explanations
- Access Until You Pass® so you have peace of mind while you study
- Dedicated support from Personal Counselors



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

Amy Renner,
Community Relations Associate of
East Coast Chapters
IMA
10 Paragon Drive
Montvale, NJ 07645-1718
Telephone (800)638-4427
Email: Arenner@imanet.org
IMA Website: 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



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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

Strategic Management Series: A series of engaging webinars that focuses on various elements of strategy and competitive analysis that is of importance and interest to management accountants.

Webinar Schedule -

- **T&E Trends and Best Practices in the Digital World**

Inside Talk - October 30, 2019 01:00 PM - 02:00 PM

- **Time Management**

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

- **Top 5 Factors in Implementing a New ERP System**

Inside Talk - November 06, 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



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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

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