



Catawba Valley Chapter

November 2019

Message from the President

Hello Members,

We are entering the month of November; Fall is in the air. Football games, Fall festivals, Thanksgiving and the IMA Catawba Valley Fall Conference – all of the best of Fall.

The flyer is attached to this Newsletter. Even if you are not in need of CPE credits attending one or more of these sessions will be helpful. We have some of your favorite speakers with new presentations, and a couple of new sessions that have great real world application. In keeping with tradition, the Conference will be at the Hickory Metro Convention Center, always a great facility and Liazzo’s will cater the lunch. In the past, we have had excellent food choices throughout the day. If you are interested in attending by Webinar, that information is on our website, along with the seated sessions. Please take time to share this information with others you work with.

The Board has been working with both Student Chapters to get Finance Students enrolled to attend the Student Leadership Conference that IMA Global sponsors, which is in Charlotte this year. The dates are November 14th – 16th. We were able to send several students from both groups, and the Carolina’s Council has provided some funds to help in the efforts to send as many as possible. There are many different sessions giving real life experiences to those who will soon be joining the workforce.

Heads up! Our December meeting is on Friday, December 6th at the Lake Hickory Country Club. The presentation will be a tax summary for the year – so mark your calendars – we will need reservations by noon on December 3rd.

Do you like to shop? We will be helping a family from the Family Guidance Center with Christmas again this year. If you have any interest in shopping for another family (with Chapter money), please contact me.

Take time this month to appreciate those you work with, your neighbors and family and friends. Express how much they contribute to your life, just simply thanking someone, or picking up a drink once in a while can mean so much.

Ellen

UPCOMING EVENT:

FRIDAY, NOV. 22ND
ANNUAL FALL CONFERENCE
HICKORY METRO CONV. CTR.
1960 13TH AVE DR SE, HICKORY
8:00AM – 5:00PM

**SEE ATTACHED FLYER FOR
MORE DETAILS**

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Calendar of Events

IMA Monthly Meetings 2019-2020

<u>Date</u>	<u>Town</u>	<u>Info</u>
August 25	Hickory	Crawdads event, Sunday on the Picnic Deck.
September 20	Morganton	Morganton Community House 120 North King St Lunch - social at 11:30 with meeting from 12-1 pm
October 11	Lenoir	Broyhill Civic Center 1913 Hickory Blvd (321) Lunch - social at 11:30 with meeting from 12-1 pm
November 22	Hickory	Conference, Hickory Metro Convention Center All day event, including lunch
December 6	Hickory	Lake Hickory Country Club 430 17 th Ave NW Lunch - social at 11:30 with meeting from 12-1 pm
January 9 or 16	Hickory	Dinner w/APICS Catawba Country Club DINNER 5:30 to 8 pm including registration/social
February 21	Morganton	Morganton Community House 120 North King St. Lunch - social at 11:30 with meeting from 12-1 pm
February 28	Asheville	Conference, Hilton Biltmore, w/Carolina's Council. All day event, including lunch
March 20	Lenoir	Broyhill Civic Center 1913 Hickory Blvd (321) Lunch - social at 11:30 with meeting from 12-1 pm
April 17	Hickory	Lake Hickory Country Club, 430 17 th Ave NW Lunch - social at 11:30 with meeting from 12-1 pm

Mission Statement

To provide personal and professional development opportunities in management accounting, financial management and information management through education and association with business professionals and certification in management accounting and financial management to members in the Catawba Valley area.

**RSVP to [Kim Gales](mailto:kimgales1@gmail.com) at kimgales1@gmail.com
by **NOON** on **Tuesday** before each meeting.**

**2019 – 2020
Catawba Valley IMA
Officers**

President: Ellen Knauf
President-Elect:
Treasurer: Jil York
Secretary: Charles Nartker
Prof. Education: Ron Nicholson
Administration: Charlie Nartker
Communication: Kim Gales
Membership:

**2018 – 2019
Catawba Valley IMA
Directors**

- **Publicity:** Kim Drum-Gales
- **Webmaster:** Lindsey Huffman
- **Asst. Webmaster:** Rhonda Young
- **CMA Program:** Ron Nicholson
- **Employment:** Beth Prewitt
- **Reservations:** Rhonda Young
- **Newsletters:**
- **Education/Webinar:** Rhonda Young
- **Student Activities:** Lacy Sanchez
Chelsea Ledford
Kim Zahller
- **Scholarship:** Lacy Sanchez
- **Carolina Council Delegate:** Ron Nicholson
Ellen Knauf

*IMA has updated their website. Please make sure your information for your profile is correct. To access you data go to www.imanet.org. Under the [IMA Membership](#) section click on “**LOG IN**”. Your log in is your IMA membership number and your password is your last name, then click on “**GO**”. In the upper right hand corner of the screen you should see “Welcome, (your name) | “[My Profile](#)” | “[Logout](#)”, click on “**My Profile**”. Now you can view and edit your information.*



The Association of
Accountants and
Financial Professionals
in Business

www.imanet.org
<https://Linkup.imanet.org/carolinasregionalcouncil/home>
<http://catawbavalley.imanet.org>

Look/Go here:

- *Employment opportunities
- * RSVP for the monthly meetings
- * Give us feedback

**IMA Catawba Valley Chapter
P.O. Box 2132
Hickory, NC 28603**

http://www.linkedin.com/groups/Catawba-Valley-IMA-Chapter-4576209/about?trk=anet_ug_grppro
<http://www.facebook.com/pages/Catawba-Valley-IMA-Chapter/133913923378743>

Are you taking advantage of your IMA benefits?

IMA members are eligible for special offers from leading brand partners, providing discounts on:

- Insurance
- Office supplies
- Travel
- Executive recruitment
- Other business services

Learn more about these by visiting--www.imanet.org or calling 1-800-638-4427

CMA® Certification

Our Chapter has a rich history of almost two decades of providing support to members in earning the CMA. Many are enjoying the benefits of being a CMA because of this intensive support. Large discounts are currently available on Gleim review materials. [Click here](#) to find contact information for CMA Review. Take advantage of our experience and tell us your needs!

Achieve success in 2018 with the help of a Professor-Led CMA Live Review

Presented by the Catawba Valley IMA Chapter and **GLEIM®**

ENJOY

- Premium Gleim CMA Review System
- Unlimited access to professors
- Extensive coverage of practice multiple-choice and essay questions
- Access Until You Pass®

On-demand personal coaching available.
Spots are limited and do not include face-to-face class time.

Enroll Now!
Class size is limited.

Professor Ron Nicholson, CMA, MBA
ronnicholson@compascable.net
828.438.1019

Both parts \$1,495
Per part \$795

GLEIM DISCOUNT

All members of the Catawba Valley Chapter IMA may now purchase all CMA materials and online CPE at a discount of 20-30%. This includes pre-discounted sets. Standard shipping and handling will apply.

		Catawba Valley Goals for 2019-2020									
Calendar year is May 1-April 30		1	2	3	4	5	6	7	8	Completed	Notes
1	Publish six publicity items: Includes Meeting announcements, Events and Conference	HDR 9/12/19	Lenoir 9/15/19	HDR 10/5/19	Lenoir 10/3/19						Kim
2	Publish six additional publicity items:										Kim
3	Provide an IMA/CMA promotional mailing to potential members										
4	Sponsor a student night/event- a dedicated chapter meeting										
5	Sponsor an IMA booth at a local job fair										
6	Provide formal mentoring opportunities for board members										Ongoing for chapter members
7	Make a guest presentation in classroom: discuss IMA certification opportunities										
8	Participate in a charitable event- REQUIRIES multiple members										
9	Develop a written annual plan that aligns with Global's strategic plan										Board
10	Prepare an annual budget										Treasurer
11	Hold regular scheduled board meetings	6/26	7/9	10/21							4 minimum
12	Hold a Chapter Management Session to train incoming officers	6/26									President
13	Publish 8 informational communications to board or chapter members	7/3	8/5	9/9	10/2	11/4					Newsletters-4 minimum
14	Publish 4 additional informational communications to board or chapter members										IMA newsletters
15	Provide support for a regional or council IMA activity										Host Carolinas Council Winter Meeting-Feb
16	Two board members attend Council's Spring Leadership Training Session or Chapter Leadership Effectiveness workshop (CLEW)	Ellen 7/17	Ellen 8/13	Rhonda 8/13						Complete	ANY Board Member
17	Attend two volunteer leaders teleconference calls										Any Board Member
18	Submit best practices ideas to the Chapter & Council Best Practices Forum										
19	Maintain more than 4 active board members for the year										Board
20	Publish an annual chapter program book of events or chapter roster										
21	Facebook and LinkedIn										Links are on website
22	Sponsor Student Chapter										CVCC Accounting Club & APP State
23	Organize and Participate in a Plant Tour by a member of finance										
24	Have a chapter member serve on a Global Committee or Global Board of Directors										

25	Attend at least two council meetings (by telephone conference call)	Ellen 7/20									Ron & Ellen
26	Member to publish article in <i>Strategic Finance, Mgmt Accounting Qtrly</i>										
Items below are Extra Credit. These show our dedication to the CMA program and push us to winning a Banner each year											
E1	Promote CMA certification in publication										2 success stories 25 points
E2	Director for CMA program position assigned, hold 2 activities for program										25 points-Ron
E3	Promote CMA through 2 special communications to a targeted group										50 points -NOT newsletter
E4	Promote CMA through a presentation to a university or targeted group										1 delivery w/10 + to University =50pts
E5	Establish structured mentoring relationship w/survey returned to Global for CMA Exam										1 relationship is 75 pts, 2 or more are 150 pts CMA review Ron
E6	Sponsor/actively co-sponsor CMA Review Course 3 classes w/review										3 classes is 100 pts, 6 classes is 200 pts
E7	Promote CMA to Corporate, Government or NonProfit of 5 or more										25 points

JOB OPENINGS

If your company is looking to fill a position and you'd like to advertise it in the IMA newsletter, please forward the ad to Beth Prewitt at dbprewitt@hsmsolutions.com by the last day of the month preceding the month in which you want the ad to be printed.