



Catawba Valley Chapter

September 2018

Message from the President

Hello IMA Members!

It was great to meet Laura Davis, the 2017 winner of the Joseph F Ryan Student Scholarship! She is continuing her education at UNCC in the finance field. She has an interest in investigative accounting, or maybe the term is forensic accounting – whichever direction she heads, I am certain she will find many opportunities.

The role of an accountant has changed and grown over the past 30 years. While there is always a need for the original style of accountant who handled transactions and ran financial statements, we have all seen how accounting has moved into many other areas. More accountants are working in financial analysis roles, and being a driving force in the direction a company takes. The topic of our presentation in September is “Emerging Issues Facing Today’s Accountant” presented by Todd Wright. Please read more about Mr. Wright farther in this Newsletter.

Our September presentation will be a dinner, and is one of two Student nights we hold each year. I am pleased to announce that we will have several students from Appalachian State’s Finance department coming to this meeting, along with students from CVCC. This meeting is an open invitation to any and all students to see what our IMA Chapter is about. If you know of a student interested in any finance role, please encourage them to attend.

We have been working on the speakers and presentations for our Fall Conference. We are expecting to have a great line up this year. Mark your calendars for Friday, November 16th, and watch for more details soon.

Lastly, we are still looking to fill the positions of Membership and Treasurer. We are looking for someone with an interest in helping grow our Chapter. The time needed is only a few hours each month at the most, and there are several who can help with training and support. I am looking forward to hearing you are interested in one of these positions.

Regards,
Ellen

UPCOMING EVENT:

THURSDAY SEPTEMBER 20, 2018

STUDENT NIGHT

Lake Hickory Country Club

Register 5:00 / Speaker 5:30

**Todd Wright discussing
Emerging Issues Facing Today’s
Accountants**

MEMBERS - \$20

STUDENTS - \$5

GUESTS - \$25

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Calendar of Events

DATES FOR 2018-2019 MEETINGS:

September 20th --Student Event-- Todd Wright: Emerging Issues Facing Today's Accountants
October 19th --Lake Hickory Country Club -- Breakfast Meeting
November 16th -- FALL CONFERENCE @ Hickory Metro Convention Center
December -- TBD
January -- Joint Meeting with APICS
February 15th -- Lake Hickory Country Club -- Breakfast Meeting
March -- TBD
April 19th -- Lake Hickory Country Club -- Lunch Meeting
May 24th -- Joint Meeting with APICS @ Catawba Country Club

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 SHERONDA FOX at 828-328-2201, ext. 3223 or sffox@hsmnsolutions.com
by NOON on Tuesday before each meeting.

**2018 – 2019
Catawba Valley IMA
Officers**

President: Ellen Knauf
President-Elect:
Treasurer:
Secretary: Charlie 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:** Sheronda Fox
- **Newsletters:** Kelly Frank
- **Education/Webinar:** Rhonda Young
- **Student Activities:** Lacy Sanchez
Chelsea Ledford
- **Scholarship:** Donna Frushour
Kim Zahller
- **Membership:**
- **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
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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.

Meet the Speaker – September 2018

Todd Wright

Todd Wright will be our speaker for IMA Student Night. Todd considers himself to be a lifelong student—out of both desire and necessity (... more on this during his presentation ...).

His background includes stints in information technology (IT) as a systems administrator and manager of IT security and risk; internal auditor; director of operations and finance; and, most recently, Oracle Fusion Cloud architect.

Todd resides in Hickory with his family, is a graduate of Gardner-Webb University, and has held numerous certifications in IT, security, and audit. (Todd is also currently pursuing his CMA!) He will be talking about “**Emerging Issues Facing Today’s Accountants.**” Topics will include:

- *The demand for skilled accounting professionals who can deliver predictive insights to leadership*
- *The future of International Financial Reporting Standards*
- *Technology, accounting, and Enterprise Resource Planning systems*
- *Fraud control in the accounting practice*

APICS Foothills press release – August 31, 2018



For immediate distribution

Hickory, NC ---- The APICS Foothills Chapter will hold its September Professional Development Meeting Thursday September 13 at the Catawba Country Club, 1154 Country Club Rd, Newton, NC. The program will feature two students from Appalachian State University.

Title: Summer Internships: Real Projects That Make a Difference

Summary: Two students from Appalachian State University, both expected to graduate in December 2018 will speak about the projects they worked on during their summer 2018 internships. They will speak about the motives that drove their respective companies to conduct the projects in the first place and what the outcomes of the projects were. Then they will explain their roles and responsibilities followed by a discussion about their overall internship experience. They will discuss what they learned about their company's approaches to conducting projects (the good, the bad, and the ugly), which will include topics such as teamwork, communication, and goal setting, among other topics. They will end by providing recommendations and insights that they feel could improve the likelihood of successful projects. There will be time for questions and answers throughout the presentation.

Registration begins at 5:30PM with a dinner and program at 6:15PM. Fees are \$20 for non-members and guests, \$15 for APICS members and \$5 for students. Reservations can be made with Bill Phillips at explore2@bellsouth.net or by calling 828-403-6254.

The APICS Foothills Chapter serves supply chain management professionals and others interested in the field in the Hickory, Lincolnton, Gastonia, Morganton, Lenoir, Boone and the surrounding areas. The chapter is committed to developing members' professional education and networking opportunities and offers training to local businesses.

APICS Foothills Chapter, Inc.
Education is Learning what you didn't even
know you didn't know.

Daniel J. Boorstin



APICS CPIM Part 1–Basics of Supply Chain Management



The Foothills APICS Chapter will hold an educational event/review class in the Hickory (NC) area for the APICS Certified in Production & Inventory Management Part 1 – Basics of Supply Chain Management. Classes will be held on Wednesday evenings beginning September 12, and will include nine (9) sessions, from 5:30 to 8:30 pm. The classes will be held at Catawba Valley Community College in the Corporate Development Center located at U.S. 70, 2664 US Hwy 70 SE, Hickory, NC 28602, with parking and building access from 21st St Dr SE.

The cost to attend the program is \$995.00 per module for APICS PLUS members and \$1,215.00 for non-members & APICS CORE members. This includes a participant workbook and on-line study tools. The non-member rate also includes a one-year APICS membership.

Deadline to confirm enrollment in class is Friday noon, September 7, 2018, so that courseware material can be ordered. Payment must be made by the start of class on Wednesday, September 12, 2018. Either mail it to the instructor at the address below or bring to the first class.

APICS Foothills Chapter, Inc.

Mail Payments to:
Dave Lehman
1305 Condor Drive
Greensboro NC 27410-2714
Phone: 336-602-0136
Email: davelesr@bellsouth.net

		Catawba Valley Goals for 2018-2019									
Calendar year is May 1-April 30		1	2	3	4	5	6	7	8	Completed	Notes
1	Publish six publicity items such as Meeting announcements, events, confs	7/8	8/5	8/26							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										Sept & March
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										Charlie & Lacy
8	Participate in a charitable event- REQUIRES multiple members										Christmas Family
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	8/6									4 minimum
12	Hold a Chapter Management Session to train incoming officers										President
13	Publish 8 informational communications to board or chapter members	5/1	6/4	7/2	8/1						Newsletters-4 minimum
14	Publish 4 additional communications to board or chapter members										IMA newsletters
15	Provide support for a regional or council IMA activity										
16	Two board members attend Council's Spring Leadership Training or Chapter Leadership Effectiveness workshop										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 5 active board members for the year										Board
20	Publish an annual chapter program book of events or chapter roster										Lindsey/Rhonda
21	Facebook and LinkedIn	X								COMPLETE	Links are on website

22	Sponsor Student Chapter										
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)	6/23/2018									Ron & Ellen
26	Member to publish article in <i>Strategic Finance, Mgmt Accounting Qtrly</i>	June									

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.