



Catawba Valley Chapter

March 2017

Message from the President

Welcome March!

With the warmer weather we have had recently, it feels more like Spring every day. Let's hope it continues.

Now that March is here our attention also moves to income tax preparation and all that goes with it. That includes the security of your information. Our speaker this month is Jonathan Magan, Senior Vice President from Wells Fargo Bank in Charlotte. He has over 25 years' experience in risk management including financial and operational exposure risk. Jonathan will share with us the Cyber Security and Insurance Update for 2017. It should be interesting to hear how Wells Fargo is addressing the security issues and to see how those ideas may work for others.

At the end of March, IMA Global asks that we turn in our new list of Board Members for the year. We are looking for someone to fill the following positions: Secretary, Regional Council Delegates (2), Director of Employment, Communication Leader, Meeting RSVP's (including Conferences), and Membership. Generally most of the communication is handled through email, with 5 or 6 meetings by the Board each year. If you are interested or have someone to recommend for one of these positions, please contact any Board Member.

There are some other ways to help our Chapter if your time through the year is limited. We send out an email blast before both of our Conferences to boost attendance. The email list is very long and it is helpful if several people take just a few hundred names to email. To help with the Fall Conference, someone could take on the responsibility of booking the Convention Center and working with the Caterer or help in sending out the CPE certifications.

Many hands make the work lighter – a phrase I have heard often in the past few months. I hope to hear from a few to help our Chapter move forward.

Best regards,
Ellen Knauf

UPCOMING EVENT:

THURSDAY- MARCH 23, 2017

****BREAKFAST****

Lake Hickory Country Club

8:00 = Registration

8:15 = Speaker and Meal

Speaker = Jonathan Magan

Members - \$10

Students - \$5

Guests - \$12

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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 Kelly Frank at ksfrank@hmsolutions.com by the last day of the month preceding the month in which you want the ad to be printed.

Calendar of Events

March 23, 2017	Breakfast Meeting Speaker: Jonathan Magan from Wells Fargo
April 21, 2017	Luncheon Meeting Speaker: Nathan Hurett Catawba County Economic Development
May 12, 2017	Luncheon Meeting
May 19, 2017	Annual Conference Asheville, NC

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 [NIKKI SHOULDERS](mailto:snsoulders@elite-cs.com) at (828) 267-7813 Ext 1123 or snsoulders@elite-cs.com
*by **Tuesday** before each Thursday meeting.*

To self register click here: [Register for meeting](#) (CTRL + click here)

**2016 – 2017
Catawba Valley IMA
Officers**

President: Ellen Knauf
President-Elect:
Treasurer: Ellen Knauf
Secretary:
Administration:
 Team Leader
Communication:
 Team Leader
Prof. Education: Karen Wilson
 Team Leader
Membership: Danette Landrum
 Team Leader

**2016 – 2017
Catawba Valley IMA
Directors**

- **Assist. Treasurer:** Beth Pernel
- **Publicity:** Kim Drum-Gales
- **Assist. Secretary:** -----
- **Webmaster:** Lindsey Huffman
- **CMA Program:** Ron Nicholson
- **Employment:** Lisa Coffey
- **Meetings (RSVPs):** Nikki Shoulders
- **Newsletters:** Kelly Frank
- **Education Team:**
- **Direct of Student Activities:** Christy Lefevers
- **Membership Team:** Shanon Crawford
- **Admin Team:** -----
- **Long Range Planning:**
- **Carolina Council Delegate:** Ron Nicholson



The Association of
Accountants and
Financial Professionals
in Business

*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.*

www.imanet.org
www.imacarolinacouncil.org
www.catawbavalley.imanet.org

Look/Go here:

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

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>

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

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!

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 2016-2017 Year									
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	5/2016	9/2016	10/2016	11/2016	12/2016	01/2017				Kim
2	Publish six additional publicity items:										Kim
3	Provide an IMA/CMA promotional mailing to potential members	10/2016									Save the date Card for conference-Ron
4	Sponsor a student night/event- a dedicated chapter meeting	9/22/16									Oct & 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										Christy
8	Participate in a charitable event- REQUIRES multiple members	12/23/16									Christmas Family
9	Develop a written annual plan that aligns with Global's strategic plan										Board
10	Prepare an annual budget	3/2/17									Ellen/Beth
11	Hold regular scheduled board meetings	9/14/16	3/2/17								
12	Hold a Chapter Management Session to train incoming officers										Ron
13	Publish 8 informational communications to board or chapter members	5/2016	6/2016	9/2016	10/2016	11/2016	12/2016	01/2017	02/2017		IMA newsletters
14	Publish 4 additional informational communications to board or chapter members										IMA newsletters
15	Provide support for a regional or council IMA activity										Fall Council conference
16	Two board members attend Council's Spring Leadership Training Session										Rep needed
17	Attend two volunteer leaders teleconference calls										
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
21	Facebook and LinkedIn										Links are on website
22	Sponsor Student Chapter										
23	Organize and Participate in a Plant Tour by a member of finance										ideas?
24	Have a chapter member serve on a Global Committee or Global Board of Directors										Representative needed
25	Attend at least two council meetings (by telephone conference call)										Rep needed

Items below are Extra Credit. These push us to winning a Banner each year

E1	Promote CMA certification in publication										25 points newspaper
E2	Director for CMA program position assigned										50 points-Ron
E3	Promote CMA through a special mailing to a targeted group										50 points (save a date card)
E4	Promote CMA through a presentation to a university or targeted group										75 points-Ron
E5	Establish structured mentoring program to assist members preparing for CMA Exam										150 points CMA review Ron
E6	Sponsor/actively co-sponsor CMA Review Course (volunteer support, use of educational/communication for financial risk)										150 points-Ron

APICS Foothills Chapter press release
For immediate distribution 2/28/17

APICS Foothills Chapter Meeting, March 9, 2017; Registration 5:30 PM. Transportation Insight Corporate Campus Tour.

Registration; Contact Bill Phillips at explore2@bellsouth.net 828-584-8197

Location: 310 Main Avenue SE, Hickory, NC 28602
APICS Foothills Chapter Website: <http://www.apics254-foothills.org>

Transportation Insight, a third party logistics services provider, will host the APICS chapter at their new corporate campus located in downtown Hickory. The tour will start off with a presentation by Paul Thompson, Transportation Insight's Founder and Chairman, at their BirdDog Logistics freight brokerage center in the Grandfather Room located in the Americas building. After the presentation, there will be a site tour. Transportation Insight is also planning to provide a light meal to all tour participants so prior registration is strongly recommended to be able to give them an accurate headcount prior to the tour. They have requested a preliminary number on Fri. March 3rd and a final date to register by the COB on Mon. March 6th.

Tour participants should park at the north end of the Americas building located directly behind Transportation Insight's Global Building, the renovated Lyerly Mill Building, where their corporate offices are located. This requested parking location is identified with red stars in a Google Map below.

The facility is an office environment so no specific safety precautions or apparel/shoes considerations will be necessary.