



Catawba Valley Chapter

February 2017

Message from the President

Hello Members,

January is behind us, and the days are getting longer. February brings questions; will the Groundhog see his shadow? Who will win the Superbowl? Will the ads and halftime show be memorable (in a good way at least)? Will the florists run out of flowers on Valentine's Day? Should we be planning for a Spring Break? Only time will give us the answers to these questions. But sometimes time is not a friend and we should protect our families by planning for future events.

Our speaker this month can help us with planning. Beth Deal, a Certified Estate Planner has been working with families and individuals for over 25 years. She is trained in Estate planning, retirement planning and financial management, giving her the ability to pull all of these pieces together for her clients. Beth is a member of the Financial Planning Association and the Million Dollar Roundtable, and locally she is a member of the Hickory Downtown Development Association and the Catawba County Chamber of Commerce. I am very interested in hearing her presentation this month, and I look forward to seeing you there.

Our congratulations to Rhonda Young and Liza Van Cauwenberghe the most recent graduates to earn CMA Certification from our Chapter. It takes commitment to study and pass this Certification. If you are interested in earning your CMA Certification, we have CMA review classes available. Well done!

The dates of the meetings for March, April and May are listed farther back in this Newsletter. We are working to have the Catawba County Development group speak at either the April or May meeting. There are many good things happening in the area after all of the work they have been doing so it will be good to hear the update.

Respectfully,
Ellen Knauf

UPCOMING EVENT:

FRIDAY- FEBRUARY 17, 2017

Lake Hickory Country Club

11:30 = Social

12:00 = Speaker and Lunch

Speaker = Beth Deal

Members - \$17

Students - \$5

Guests - \$20

IN THIS ISSUE

- | | |
|-----|--|
| 1 | President's Message |
| 2 | Calendar of Events/
Meeting Registration |
| 3-4 | 2016-2017 Officers
IMA information
Certification Offerings |
| 5-7 | Achievement Goals for
2016-2017
APICS Press Releases |

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

February 17, 2017	Luncheon Meeting – 11:30 Lake Hickory Country Club Speaker: Beth Deal Topic: Estate, Retirement, Financial Planning
March 23, 2017	Breakfast Meeting Speaker: Mike Bennett from Wells Fargo
April 21, 2017	Luncheon Meeting
May 12, 2017	Luncheon Meeting

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 at (828) 267-7813 Ext 1123 or snshoulders@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 Land
 • **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					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										Ellen/Beth
11	Hold regular scheduled board meetings	9/14/16									
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			IMA new letters
14	Publish 4 additional informational communications to board or chapter members										IMA new letters
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 new spaper
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-sponcer CMA Review Course (volunteer support, use of educational/commnication for financial risk)										150 points-Ron

**APICS Foothills Chapter press release
For immediate distribution 2/1/17**

APICS Foothills Chapter Dinner Meeting, February 9, 2017; Registration 5:30, Meeting at 6:00 p.m. Joint Meeting with the Metrolina Chapter of Project Management Institute

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

Location: Catawba Country Club, 1154 Country Club Rd, Newton, NC 28658

APICS Foothills Chapter Website: <http://www.apics254-foothills.org>

Topic: "Changing Operations Through Data Insights"

Speaker: Dr. Steven Leon, Assistant Professor of Supply Chain Management at Appalachian State University

Steven has a Ph.D in Transportation and Logistics from North Dakota State University

He has over 25 years of both industry and academic experience in leading teams in flight and airline operations, aviation research, web-based learning technologies and has taught supply chain operations management and aviation management courses in multiple universities.

Steven has also started and leads a web-based educational technologies company providing educational services for the airline industry.

He was a professional pilot for Henson Aviation/USAir Express and United Airlines for several years.

Steven has published several peer reviewed and professional industry articles, presented at numerous professional seminars and written the following supply chain management books and book chapters;

Books

**Finance and Supply Chain Management
Sustainability in Supply Chain Management Casebook: Applications in SCM**

Book Chapters

**Operations Management, Sustainability in the Supply Chain
Cases in Sustainability: Applications in Supply Chain Management**

His presentation is about challenging the status quo in operations. Instead of improving current processes, how about we consider doing something different.