



# Catawba Valley Chapter

October 2016

## Message from the President

Greetings to all IMA Members,

Welcome Fall! There was a very good turnout of students at our Fall Student night. A big Thank You to Jim Santaniello and Cathi Hall for sharing their experiences with IMA as student members themselves. We are looking for a few of these students to join our group this year.

We begin our regular meeting schedule this month with a lunch meeting. We are delighted to have Jennifer Lucas from Sun Trust present 'Emerging Trends in Payments and the Implications for Financial Professionals'. Jennifer comes to us highly recommended from Ken Harris, the Senior Vice President Commercial Banking from Sun Trust. Her presentation will include information about faster payment options, the rise of non-bank providers, and the Mobile office and will touch on Biometrics. There should be something of interest for everyone!

The November Conference is coming up soon, November 10<sup>th</sup>. We have an exceptional lineup for this year! Chuck Gallagher will start off with "The Human Side of Ethics" this will be interesting and is a full 2 CPE credit hours. He is followed by Martin Brossman with "Building Your Professional Web Presence and Keeping Your Family and Yourself Safe". Martin gives plenty of good advice we can use professionally and personally in his presentation. The action continues after lunch with Chuck Gallagher with "What's Your Strong Suit?" How many times have you been in a meeting and after much discussion discover not everyone understands what is being said? Chuck will address differing communication styles and show ways to work with each. We will round out the day with Rob Hickson, always a favorite! Rob will give us the "Technology Update" which is sure to be jam packed with excellent information.

I look forward to seeing many of you over these 2 events. Please visit the website for more information.

Best Regards,  
Ellen Knauf

### UPCOMING EVENT:

**FRIDAY- OCTOBER 21, 2016**

Guest Speaker: **Jennifer Lucas**  
**EMERGING TRENDS IN BANKING**

**MEETING PLACE & TIME:**  
**LAKE HICKORY COUNTRY CLUB**

**LUNCHEON**  
**SOCIAL 11:30 AM**  
**LUNCH 12:00 PM**

**MEMBERS \$17**  
**STUDENTS \$5**  
**GUESTS \$20**

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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](mailto: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

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October 21, 2016	Luncheon Meeting Location: Lake Hickory Country Club Speaker: Jennifer Lucas Topic: Emerging Trends in Banking
November 10, 2016	ANNUAL CONFERENCE 8:00 am – 5:00 pm Hickory Metro Convention Center See flyer attached to this e-mail for info.
December 9, 2016	Breakfast Meeting
January 12, 2017	Joint Meeting with APICS Location: Catawba Country Club
February 17, 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 [snsoulders@elite-cs.com](mailto: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 Land
- **Membership Team:** Shanon Crawford
- **Admin Team:** -----
- **Long Range Planning:**
- **Carolina Council Delegate:** Ron Nicholson



The Association of  
Accountants and  
Financial Professionals  
in Business

[www.imanet.org](http://www.imanet.org)  
[www.imacarolinascouncil.org](http://www.imacarolinascouncil.org)  
[www.catawbavalley.imanet.org](http://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.linkedin.com/groups/Catawba-Valley-IMA-Chapter-4576209/about?trk=anet_ug_grppro)  
<http://www.facebook.com/pages/Catawba-Valley-IMA-Chapter/133913923378743>

IMA has updated their website. Please make sure your information for your profile is correct. To access you data go to [www.imanet.org](http://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.

**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

## 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 <b>six</b> publicity items: Includes Meeting announcements, Events and Conference										Kim
2	Publish <b>six</b> additional publicity items:										Kim
3	Provide an IMA/CMA promotional mailing to potential members										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- <b>REQUIRES</b> multiple members										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						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	<b>Two</b> 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
<b>Items below are Extra Credit. These push us to winning a Banner each year</b>											
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/commincation for financial risk)										150 points-Ron

# APICS Foothills September PDM-Supply Chain Management Analytics

## When

Thursday October 20, 2016 from  
5:30 PM to 7:30 PM EDT

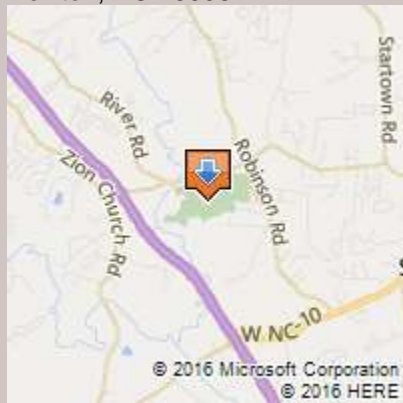
[Add to Calendar](#)

Please join us at the October 20th PDM.

## Where

### Catawba Country Club

1154 Country Club Road  
Newton, NC 28658



[Driving Directions](#)

Topics: Supply Chain Management Analytics

Our speaker this month is Don Craig, Sr. Supply Chain Manager for Transportation Insight - 3PL

Don has worked in various Supply Chain roles. He was previously with Leanlogistics - SAAS model TMS solutions provider responsible for engineering and business intelligence, Lowes Home Improvement responsible for \$400M inventory and supply chain spend, Menlo Worldwide responsible for 5 client manufacturing facilities and the associated spend, Cardinal Logistics - 3PL responsible for client's N.A. manufacturing facility, Schneider Logistics - 3PL responsible for operations and continuous improvement, UPS - customer service/operations.

Here is a brief description of his presentation:

A discussion regarding the most frequently requested/necessary analytics projects that present the highest degree of impact to the supply chain, and why.

[Get more information](#)

**[Register Now!](#)**

[I can't make it](#)

Here, provide contact information if invitees have any questions about the event or how to register.

Finally, thank them for their attention and response, and tell them you look forward to seeing them at your event.

**Sincerely,**

Bill Phillips, CFPIM  
APICS Foothills Chapter  
[explore2@bellsouth.net](mailto:explore2@bellsouth.net)  
828-403-6254

