



# Catawba Valley Chapter

December 2016

## Message from the President

Hello Members!

Did you attend our Fall Conference? If so, what did you think of the speakers? My overall take was it was great! Ok, so we had a rocky start with some technical issues for our very 1<sup>st</sup> webinar, but overall, I enjoyed the speakers, and topics. It was very nice to get up and move after lunch. Ron & Karen did an excellent job in selecting speakers with topics of interest. A very big thank you to both for the extra work involved to put this together.

Thanksgiving and the November Conference are behind us, and we are approaching the end of the calendar year again. At our BREAKFAST meeting in December, we will hear about business and personal tax updates for 2016. Melissa Schronce and Eric West will bring us up-to-date from Davidson, Holland, Whitesell & Co LLC here in Hickory. This will be a good time to ask any questions you may have – we have all heard differing things about the changes this year and they can help us with those questions.

We will be helping a family or 2 again this year with their Christmas needs and are looking for 1 or 2 shoppers. If you are interested in helping with this project, please send me an email at [emknauf@hmsolutions.com](mailto:emknauf@hmsolutions.com). In the past we have had 2 people for each family, which makes the shopping go quickly, and is fun.

I enjoy the Christmas season and each year I remind myself this is not about gifts, or who can get the biggest or best present, but about faith. It is a time to show compassion and caring, and to find ways to bring them into everyday. I wish you all a very Merry Christmas, and my best wishes in the New Year!

Ellen

### UPCOMING EVENT:

**FRIDAY- DECEMBER 9, 2016**

**BREAKFAST MEETING**

**Lake Hickory Country Club**

**8:00 AM**

Melissa Schronce of Davidson, Holland, and Whitesell to present a Tax Update

**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](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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December 9, 2016	<b>Breakfast Meeting – 8:15</b> Melissa Schronce – Tax Update Davidson, Holland, and Whitesell
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 [snshoulders@elite-cs.com](mailto: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](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.

[www.imanet.org](http://www.imanet.org)  
[www.imacarolinacouncil.org](http://www.imacarolinacouncil.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 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](http://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.



The Association of  
Accountants and  
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in Business

The IMA-Charlotte is hosting 8 hours of NASBA approved CPE on Friday, December 16<sup>th</sup> at a bargain cost of \$75 for the full day and \$50 for a half day. Included in the program will be 2 hours of ethics and a voucher for lunch at Johnson & Wales. Registration for this event is available now at <http://www.ima-charlotte.org/events>. First come-first serve as we are limited to 50 attendees.

**Location:** Johnson & Wales University, 901 West Trade St., Charlotte  
Parking validated for the Cedar Street Parking Deck

**Registration:** <http://ima-charlotte.org/events> Deadline to register is end of day Dec 14th

**AGENDA:**

**7:30 AM** Check In

**8:00 AM** Terri Deboo 1 hour CPE on Networking for Accountants

**9:00 AM** Ernst & Young 1 hour CPE on Technical Accounting Update

**10:00 AM** Royallen Wiley 2 hours CPE Understanding Codes of Ethics

**12:00 PM Lunch**

**1:00 PM** Jeff Creech 1 hour CPE Managing Millennials

**2:00 PM** April Simpkins 1 hour CPE Conflict Resolution

**3:00 PM** Doug Myer-Cuno 2 hours CPE My Entrepreneurial Journey

**5:30 PM** Networking Event at Cedar Street Tavern (Please register separately for this session)

**Full speaker Biographies and the CPE session learning objectives below.**

# APICS Foothills Holiday Social

## When

Thursday December 8, 2016 from  
5:30 PM to 7:30 PM EST


[Add to Calendar](#)

Dear Kelly,

Please join us at the December 8th Holiday Social.

## Where

**Catawba Country Club**  
1154 Country Club Road  
Newton, NC 28658

 Right-click here to download pictures. To help protect your privacy, Outlook prevented automatic download of this picture from the Internet.

Join us for the 2016 Holiday Social at teh Catawba Country Club. We will have festive music and a jovial atmosphere as we take a break from day to day activities and come together for a good cause. Each year we select a needy organization to collect donations for. This year we have selected the ASU Student Support Services. This organization supports first generation students who may have challenging family or financial backgrounds. To support the food pantry that the organization has, we are asking all attendees to bring either a non-perishable food item or monetary donation to the social.

[Get more information](#)

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

[I can't make it](#)

[Driving Directions](#)

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

		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	5/2016	9/2016	10/2016							Kim
2	Publish <b>six</b> 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										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

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

E1	Promote CMA certification in publication										25 points new paper
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