



Catawba Valley Chapter

September 2017

Message from the President

September has arrived and once again school has started. Our Chapter has decided to hold our Student Event in September and move it to an afternoon event. In speaking with Students and Educators, the afternoon timing would fit better in their schedules. Please join us from 4-5:30 pm on Thursday September 21st.

The topic is Fraud Close to Home and will be presented by a panel of 3 of our own members, Donna Frushour, Nathan Thompson and Ron Nicholson. Each of these individuals has been directly affected either in business and/or personal life by fraud and will lead a discussion on what happened, how it was uncovered and the steps involved in recovery. We are expecting this to be an interactive event.

Recently I was reviewing the IMA Core Values and this section caught my eye:

Innovation and Continuous Improvement

We believe innovation and a spirit of continuous improvement are engines that keep us relevant, vital, and growing. Our culture embraces creativity and seeks different perspectives. We behave like owners of a "business", managing risks and identifying new opportunities in serving members and advancing the profession.

The last sentence, especially the 'advancing the profession', is the focus of our Chapter and can be seen in several ways. We hold Conferences a couple times each year, sponsor CMA review classes, and hold student nights. The 'new opportunities' would include our own NASBA certification and the Webinars added to our training. This year, we are adding Scholarship opportunities to help 'advance the profession'.

As the Accounting fields have changed over the years, we have widened our scope to not only include CPA's, but we have found the need for the CMA program. More often we are finding more individuals attending our conferences from all sides of Finance and Human Resources and business owners. "Advancing the profession" is encompassing more sides of business. Is there more we should do?

Ellen

UPCOMING EVENT:

THURSDAY- SEPTEMBER 21, 2017

**!! LATE AFTERNOON MEETING
With Refreshments !!**

Lake Hickory Country Club

4:00-4:15= Registration

4:15-5:30= Speakers

TOPIC: Fraud Close to Home

Members - \$15

Students - \$5

Guests - \$18

IN THIS ISSUE

1	President's Message
2	Calendar of Events/ Meeting Registration
3-5	2016-2017 Officers IMA information Certification Offerings
6-9	About the Speaker APICS Press Releases Achievements and Goals

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@hsm solutions.com by the last day of the month preceding the month in which you want the ad to be printed.

Calendar of Events

DATES FOR 2017-2018 MEETINGS:

- September 21st – Late afternoon meeting (4-5:30) at LHCC
Panel discussion on Fraud Close to Home
- October 27th – Breakfast Meeting at LHCC
- November 9th – ANNUAL CONFERENCE-Hickory Metro Convention Ctr.
- December 8th – Lunch meeting at LHCC
- January 18th – Dinner meeting
- February 16th – Breakfast meeting at LHCC
- February 23rd-24th – WINTER CONFERENCE-Hilton Asheville Biltmore Park
- March 16th – Late afternoon meeting (4-5:30) at LHCC
- April 13th – Lunch meeting at LHCC
- May 18th – Lunch meeting at LHCC

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 [BETH PERNELL](mailto:kepernell@hsm solutions.com) at 828-328-2201, ext. 5105 or kepernell@hsm solutions.com
by Tuesday before each Thursday meeting.

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

**2017 – 2018
Catawba Valley IMA
Officers**

President: Ellen Knauf
President-Elect:
Treasurer: Beth Pernell
Secretary: Charlie Nartker
Administration: Charlie Nartker
Team Leader
Communication: Kim Gales
Team Leader
Membership: Danette Landrum
Team Leader

**2017 – 2018
Catawba Valley IMA
Directors**

- **Publicity:** Kim Drum-Gales
- **Webmaster:** Lindsey Huffman
- **Asst. Webmaster:** Rhonda Young
- **CMA Program:** Ron Nicholson
- **Employment:** Beth Prewitt
- **Meetings (RSVPs):** Sheronda Fox
- **Newsletters:** Kelly Frank
- **Education:** Ron Nicholson
- **Student Activities:** Chelsea Ledford
- **Scholarship:** Mike Gahagan
- **Membership:** Rhonda Young
Dee Strickland
Brenda Craig
- **Carolina Council Delegate:** Ron Nicholson
Ellen Knauf



The Association of
Accountants and
Financial Professionals
in Business

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 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.

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

STUDENT NIGHT - THURSDAY, SEPTEMBER 21ST

at the LAKE HICKORY COUNTRY CLUB

from 4:00 pm to 5:30 pm

featuring

"FRAUD CLOSE TO HOME"

a panel discussion with actual business and personal fraud cases. Find out how it was detected, the results and the steps taken to resolve the situation.

Refreshments will include both Hot and Cold Hors d'Oeuvres, sweet and unsweet tea and lemonade.

Cost to attend:

\$15 for IMA Members

\$18 for Guests

\$5 Students



Pictured L-R while attending the August joint meeting with APICS are Ron Nicholson, Marilyn and Joe Ryan, Beth Pernell, Dee Strickland, Beth Prewitt and Rhonda Young. Not pictured is our photographer, Charlie Nartker.

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 2017 with the help of a Professor-Led CMA Review

Presented by the Catawba Valley IMA Chapter and **GLEIM®**

ON-DEMAND PERSONAL COACHING

Enjoy

- Premium Gleim CMA Review System
 - Unlimited access to professors
 - Extensive coverage of practice multiple-choice and essay questions
 - Access Until You Pass®

Per part **\$795**

Both parts **\$1,495**

Send contact information with payment to: IMA Catawba Valley Chapter
PO Box 2132 | Hickory, NC 28603

Enroll Now! Class size is limited.

Professor Ron Nicholson, CMA, MBA
ronnicholson@compascable.net
828.438.1019

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.

IMA Announces Record Growth in CMA
NEWS PROVIDED BY
Institute of Management Accountants
10:30 ET

MONTVALE, N.J., July 31, 2017 /PRNewswire/ -- **IMA**® (Institute of Management Accountants) is proud to announce record-breaking growth for its **CMA**® (Certified Management Accountant) program during the fiscal year ending June 30, 2017. The total number of CMA candidates grew by 40 percent to a record high of 41,000. This expansion of the program has contributed to a 21 percent compound annual growth rate of the CMA candidate pipeline over the last five years. Additionally, IMA's total membership increased by 11 percent, bringing it to the 90,000 mark, and putting the organization on track to reach 100,000 members by its 100th anniversary in 2019.

"This growth represents the tremendous commitment that our volunteers, partners and staff make to support the profession, as well as the commitment our members make to advance their careers," said Jeff Thomson, CMA, CAE, IMA president and CEO. "We're extremely proud of the success we've achieved and we look forward to reaching more milestones as we approach our 100th anniversary."

According to Thomson, IMA's continued focus on growing with confidence and integrity, and a strong balance sheet grounded in financial discipline, enabled it to invest in the multi-million-dollar "You've Got to Earn It" ad campaign. The integrated campaign resulted in 26,000 new leads for the CMA program. IMA also celebrated the 10th year of the Chinese language version of the CMA exam, as well as double-digit growth (29 percent) of new CMA candidates in the U.S.

To honor those who have supported the CMA's success, ICMA® (Institute of Certified Management Accountants), the certification division of IMA, announced the recipients of its top honors during its 2017 Annual Conference & Expo in Denver last month. Ping An Insurance of China and Johnson & Johnson were both awarded for their dedication to the CMA program.

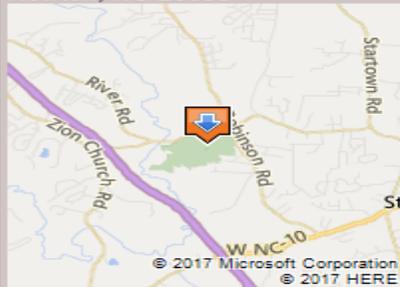
APICS Foothills September 14 PDM - How supply chains are changing and the changes in North Carolina

When

Thursday, September 14, 2017
from 5:30 PM to 7:30 PM EDT
[Add to Calendar](#)

Where

Catawba Country Club
1154 Country Club Road
Newton, NC 28658



[Driving Directions](#)

Dear Beth,

Please join us at the September 14th PDM.

Title of the presentation: "Explosive Rate of Change in Supply Chains".

Topic of the presentation: How supply chains are changing and the changes in North Carolina's logistics infrastructure with a focus on intermodal services and facilities.

Bio:

Charles Edwards joined the NC Department of Transportation in March 2016 as the Director - Logistics Strategy. His work includes freight logistics planning, working with planners on freight related issues, and developing logistics solutions for North Carolina companies.

Edwards was previously the Executive Director of the North Carolina Center for Global Logistics. The Center was dedicated to the expansion of logistics education program from high school to graduate school throughout the State of North Carolina.

Edwards began his career in the logistics industry as a truck driver. He was on the senior management team of the North Carolina-based airline that started United Parcel Service Airlines, helped introduce an innovative container to the international airline industry, managed a commercial airport, led the development of the world's largest air vehicle, and has been a senior advisor to public and private aviation and logistics projects in the United States, Europe, Africa, Southeast Asia and the United Arab Emirates.

He holds degrees from universities in Canada, the United Kingdom and the United States. He served on the faculty of the Darden School at the University of Virginia and has been a guest lecturer at universities throughout North Carolina and New Mexico. He is a frequent speaker and writer about aviation and logistics topics. In 2010 he co-authored Transport Logistics: The Wheel of Commerce and is a contributing author of the MHI sponsored Material Handling & Logistics Roadmap 2.0 (2017).

Mr. Edwards hosts the UNC-Chapel Hill - Tsinghua University Logistics EMBA program in Dubai and is co-developer of the Air Cargo Professional Development workshop program of The International Air Cargo Association. He also serves on various international and US logistics industry boards

[Get more information](#)

[Register Now!](#)

[I can't make it](#)

If you have any additional questions about the event or how to register, please contact us.

We look forward to seeing you at the PDM. Thank you for your involvement in APICS.

Sincerely,

Bill Phillips, CFPIM
APICS Foothills Chapter
explore2@bellsouth.net
828-403-6254

Catawba Valley Goals for 2017-2018

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	5/7	8/20								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										Ron/Chelsea others
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	6/29	8/16								4 minimum
12	Hold a Chapter Management Session to train incoming officers										Ron
13	Publish 8 informational communications to board or chapter members	5/17	6/17	7/1	8/1						Newsletters-4 minimum
14	Publish 4 additional informational communications to board or chapter members										IMA newsletters
15	Provide support for a regional or council IMA activity										Winter Conference
16	Two board members attend Council's Spring Leadership Training Session or Chapter Leadership Effectiveness workshop										Ellen & Ron, Others?
17	Attend two volunteer leaders teleconference calls	5/8 Ellen									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										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										Ron & Ellen
25	Attend at least two council meetings (by telephone conference call)	Ellen 7/29									Ron & Ellen

26	Member to publish article in <i>Strategic Finance, Mgmt Accounting Qtrly</i>										Publish by 3/31
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										10 attendees 50 pts, 20 attendees 100 pts
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