



The Association of  
Accountants and  
Financial Professionals  
in Business

## The Summit Report

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### Highlights

#### Employment News

Please contact [Bob Shapiro](#) if you have a job available or if you are looking for an employment opportunity.

April 2018

### Dear Akron IMA,

Please join your fellow IMA Members for Past Presidents' Night on April 18, 2018 at the HILTON GARDEN INN, 1307 E. MARKET ST., AKRON, OH 44305. **RSVP deadline is Friday, April 13th.**

Check In is at 5:30 pm.

Dinner will be served at 5:45 p.m. sharp. Pre-Technical Session begins at 6:10 p.m. and Technical Session begins at 7:10 p.m.

Cost for Members is \$25.00. Non-members pay \$30.00.

For every Pre-Technical or Technical Session that you attend, you earn 1 CPE towards your CMA or CPA requirements.

Remember, members are always welcome at meetings. Even if you're on a diet or don't feel like eating - come to hear the speakers anyway.... there is NO charge if you are not eating!

Please forward newsletter items to: [IMA Newsletter](#).

Thanks!

Kelly Heil

### President's Message

Hello IMA Members,

Welcome Spring 2018!

April's dinner meeting will be to honor our chapter's past presidents. I have experienced this myself. If you really want to get involved in the IMA, join the Board, and then become President for a year or two.

It is beneficial for the resume, as well as strengthening your leadership skills and meeting a lot of new people. I will be sending a personal invitation to our past



presidents to come and be with us in April for a free dinner. (See there are perks!)

We will also be hosting two great speakers. First, Theresa Mullen, Tax Manager at CliftonLarsonAllen, LLP, will give us a "State and Local Tax Update". Next, Kurt Taylor, Manager of Centralized Plant Accounting at The Goodyear Tire & Rubber Company will share his experiences with "Centralized Plant Accounting at Goodyear".

Many of you have expressed interest in a second tour of Goodyear's Innovation Center Manufacturing facility here in Akron. This is where the race tires are made and it is a very informative tour. If you have interest in this tour, let me know if you are interested. There are still some spaces left. I have asked for potential dates in early May and will send an email blast when we have picked a solid date. It will be in the evening, around 6 pm. This will be work CPE credit.

We also are researching a tour of the Akron Waterways Renewed Program. We would ride a trolley and learn about the history and significance of the canal, as well as see Rosie the tunnel borer. We will update you on this opportunity with an email blast as well. It is great to learn more about our local history.

If anyone would like to team up as a CMA Mentor or Mentee, we are awarded competition points for this. I, myself, am going to get back into the study mode, so if anyone would like to pair up with me as mentor, let me know. Let's get a few more relationships happening and get a few more CMAs for the chapter!

I hope everyone has signed up for the Meonske conference. 16 CPEs is good progress towards your certification education requirement. This is a great local opportunity we are lucky to have.

We still have a couple of open positions on the board for 2018-19. Let me or anyone on the Board know if you would like more information. Most of the positions do not take a significant amount of time.

Follow us on Twitter for announcements and information [@AkronChapterIMA](https://twitter.com/AkronChapterIMA).

See you on the 18th!

Linda Garrison, President  
Akron Chapter IMA  
2017/2018

## **2017/2018 Meeting Schedule**

Regular meetings for 2017/2018 will be:  
April 18, 2018 - "Past Presidents' Night"  
May 16, 2018 "Guest Night"

All monthly meetings will be held at the Hilton Garden Inn unless otherwise indicated above.

For meetings at Hilton Garden Inn check-in at 5:30 p.m., dinner at 5:45 p.m., pretech 6:10 p.m., and tech session at 7:10 p.m.

### **Pre-Tech Session - "State and Local Tax Update"**

**Hilton Garden Inn**

**April 18, 2018**

**6:10 P.M. (SHARP)**

**Theresa Mullen, MT**

Tax Manager, CliftonLarsonAllen, LLP

### **"State and Local Tax Update"**

Theresa works with clients acting as a liaison between clients and state representatives. She reviews clients' eligibility for state tax incentives to ensure that they are capitalizing on all possible state tax minimization strategies. Theresa joined CliftonLarsonAllen, LLP with more than 23 years of tax and accounting experience. She is a frequent speaker on State and Local Tax issues. Theresa was invited to testify for the Ohio House of Representatives to the Committee on Ohio's Tax Structure. Additionally, she was invited to be a member of the Ohio Society of Certified Public Accountants Young CPA Task Force Committee.



### **Education/professional involvement**

\* Bachelor of arts degree in accounting, Michigan State University

\* Master's degree in taxation, The University of Akron

### **Technical Session - "Centralized Plant Accounting at Goodyear"**

**Hilton Garden Inn**

**April 18, 2018**

**Past Presidents' Night**

**Kurt Taylor**

Centralized Plant Accounting Manager, Goodyear

### **"Centralized Plant Accounting at Goodyear"**

Kurt Taylor was born and raised in the NE Ohio area, attending high school in Medina County, and college at the University of Rio Grande, where in 1987 he obtained a BS in Accounting, with a minor in MIS. Kurt subsequently went on to work for The Goodyear Tire & Rubber Co., where he worked in Plant Manufacturing accounting and Finance for 14 years, spending time at 5 plants located in Texas and North Carolina, covering Chemical Operations, Steel Wire manufacturing and Tire manufacturing. In 2001 Kurt returned to the Goodyear HQ in Akron, to work in Corporate Manufacturing Accounting. In 2002, Kurt joined the Goodyear NA IT division, where he became part of the SAP project team that implemented SAP in 18 of Goodyear's manufacturing plants, from 2002 through 2006. In 2004, Kurt became Manager of the IT Finance team and continued to oversee SAP implementations and various other legacy



applications for the Finance and Plant Accounting business units. In 2014, Kurt became manager of the Centralized Plant Accounting team in Akron, where most of the plant accounting was now being performed. Kurt's interests outside of Goodyear include: Golf, working out, local sports, live music, cooking and local travel.

### Welcome New Members

Date Joined	Name	Employer	Sponsor
2-13-18	David Law	Youngstown State U.	Reinstatement from 8-1-14 termination
3-20-18	Lingfan Zuo	KSU Student	Wendy Tietz
4-3-18	Michael Pond	U Akron Student	

### Tour of Akron Waterways Renewed! Program (Sewer Projects)

The Akron Waterways Renewed! Program is taking reservations for the 2018 AWR Construction Sites Trolley Tour season. The FREE tour meets on Fridays from 1-3 PM at the Mustill Store, 57 W. North Street in Akron, where you will watch a video about the significance and history of the canal, as well as the ongoing Ohio Canal Interceptor Tunnel Work. After the video, you will board a trolley which will take you to a variety of storage basins and green infrastructure sites. You will also get to take pictures of "Rosie", Akron's tunnel boring machine, and underground catch basins. If interested, please contact **Ken Bechtol at 330-867-0750**

or [kpbechtol@neo.rr.com](mailto:kpbechtol@neo.rr.com) and advise which Fridays during May and June that you **CANNOT** attend. We will announce the most popular date selected in the May/June newsletters and on the chapter website.

### Come to a Board Meeting

If you would like to go behind the scenes and learn what it takes to put on a monthly tech session meeting and run the chapter, consider coming to a Board meeting. The chapter meets at 6 PM on the last Wednesday of the month at Mr. G's Pizzeria, 2955 W. Market Street, Fairlawn 44333 (330-836-1111), except as follows: no meeting in November, December meeting earlier in the month, meeting on Saturday morning in June, occasionally earlier than the last Wednesday if there is a conflict with monthly closings of employers. Here are the remaining meetings this fiscal year - April 25 and May 30. Free pizza and soft drinks; see your Board leaders in action.

### Meonske Professional Development Conference

#### Save the dates!

44th Annual Professional Development Conference, Institute of Management Accountants, Ohio Council at Kent State University. Cost is \$180 per day, \$130/day for Educators, \$50 late fee after April 18. Brochures delivered in March snail-mail.

### THURSDAY, April 26, 2018 CONFERENCE (8 hours CPE)

#### "Recent Developments and Critical SEC Updates"

Timothy F. Gearty, Partner, Gearty & McIntyre LLP, National Director & Editor-in-Chief, Becker CPA Review Course Professional Program

## **"How the CMA and Related Learning Enhances Personal Brand and Professional Reputation"**

Jeffrey Thomson, President and CEO, IMA

## **"Stop. Think. Connect: Prepare for Trends in Cybersecurity"**

Robert Boutell, Chief Information Security Officer, Alliance Data

Andrew Retrum, Managing Director, Protiviti Inc.

Martin Bally, VP & Chief Security Officer, Diebold Nixdorf

John Bingham, Former Chief Information Security Officer, Delphi Automotive

## **"Obtaining Positive Results by Using Conflict Management to Your Advantage for WIN WIN Results"**

Timothy F. Gearty, Partner, Gearty & McIntyre LLP, National Director & Editor-in-Chief, Becker CPA Review Course Professional Program

## **Keynote Luncheon Speaker: "How the CMA and Related Learning Enhances Personal Brand and Professional Reputation"**

Jeffrey Thomson, President and CEO, IMA

## **Concurrent Track #1 - "Successful Leadership with Multi-Dimensional Finance Transformations"**

Gabe Zubizarreta, CEO and Founding Principal, Silicon Valley Accountants

J. Stephen McNally, IMA Global Board of Directors

## **Concurrent Track #2 - "Ethics in Action - How to Shine in an Unethical World"**

Jeffrey Bissell, CFO and Treasurer, NMG Aerospace

## **"Professional Standards & Responsibilities - Accountancy Board of Ohio-Approved Ethics"**

Norman R. Meonske, Professor Emeritus, KSU

## **FRIDAY, April 27, 2018 CONFERENCE (8 hours CPE)**

## **"Financial Reporting Panel, Accounting Standards Update"**

Moderator: Dennis R. Beresford, Executive-in-Residence, J.M. Tull School of Accounting, University of Georgia, and former chairman of the FASB

James I. Kroeker, Vice Chairman FASB

Wesley R. Bricker, Chief Accountant, SEC

Wayne Carnall, Partner in National Professional Services Group, PricewaterhouseCoopers, and former Chief Accountant, SEC

## **Keynote Luncheon Speaker: "Disruptive Technology - The Next Big Thing that will Change Everything"**

Michael Capellas, Founder & CEO Capellas Strategic Partners

## **"Internal Controls and Sustainability Reporting - Good for Business"**

Moderator: Jeffrey C. Thomson, President & CEO, IMA

Robert H. Herz, Board member of Sustainability Accounting Standards Board Foundation, and former chairman of the FASB

Robert B. Hirth, former Chairman of COSO (2013 - January 31, 2018), and Senior Managing Director, Protivity

### Concurrent Track #1 - **"The Digital Workforce: Robotic Process Automation and Process Analytics in Accounting"**

Evan Campbell, Managing Director, Protivity's Technology Strategy  
Casey Poon, Associate Director, Protivity's Business Improvement

### Concurrent Track #2 - **"Women in Accounting or Finance Leadership Positions - The Future is Yours"**

Sandra Richtermeyer, Dean, Manning School of Business at UMass, Lowell  
Laurie Brias, Chair of the Board, Perrigo Company  
Melissa Anezinis, Executive Director, J.P. Morgan Asset Management  
Mary Hogue, Associate Professor, College of Business, KSU

### **Board of Directors Slate for 2018-2019**

Attention Akron chapter IMA members: we are now looking for a few additional Board members for the next fiscal year (Board position marked **"OPEN"** below). Note that if you serve on the Board for five years, you will qualify for reduced dues as an ELM (Emeritus Life Member) when you retire. Serving as a chapter Board member is a volunteer position that doesn't involve a huge time commitment. If interested in volunteering, please contact Linda Garrison at [Linda\\_Garrison@goodyear.com](mailto:Linda_Garrison@goodyear.com). The following chapter members were elected for the 2018-19 IMA year at the March 21 chapter meeting:

- President - Joe Richards
- VP Finance & Administration - Jeff Falter
- VP Education & Speakers - Christine Niswender
- VP Communications & Community Relations - Kelly Heil
- VP Membership - Ken Bechtol
- Treasurer - Shirley Calvin
- Secretary - Christine Niswender
- Chair Audit Committee - **OPEN**
- Chair Nominating Committee - Linda Garrison
- Director, Insurance - Roy Howarter
- Director, Speaker Archives - Linda Simko
- Director, Employment - Bob Shapiro
- Director, CMA & CFM Programs - Linda Garrison
- Director, Speakers - Yelena Kemp
- Director, Technical & Board Meeting Facilitation & Attendance - Jeff Falter
- Director, Librarian - Linda Garrison
- Director, PD Session - **OPEN**
- Director, Program Booklet - Roy Howarter
- Associate Director, Program Booklet - Ken Bechtol
- Director, Advertising - **OPEN**
- Director, Corporate & Academic Development - **OPEN**
- Director, Public Relations - Joe Richards
- Director, Special Activities - **OPEN**
- Director, Member Attendance - Jeff Falter
- Associate Director, Member Attendance - Billy Dyer
- Director, Member Relations - Jeff Falter
- Director, Retired Professionals - Wayne Hawkins
- Director, Student Relations - Wendy Tietz
- Coordinator, KSU - Wendy Tietz
- Coordinator, UA - Il Woon Kim
- Coordinator, YSU - Ray Shaffer
- Co-Coordinator, YSU - David Law



- Director, Chapter Awards - Linda Garrison
- Director, Newsletter - Kelly Heil
- Webmaster - Linda Garrison
- Co-Webmaster - Kelly Heil

### **QuickBooks Online Assistance needed**

I'm looking for someone to perform invoicing functions on a part time basis -approx 15 hours a week - in Quickbooks Online for my husband's company which provides maintenance and janitorial services for restaurants. Please have interested parties contact me via email ([robinmarshall89@gmail.com](mailto:robinmarshall89@gmail.com)) or at the number below.

Thank you,  
Robin  
Cell: (330) 310-0545

### **Annual Program Book Update**

The Board of Directors has decided to stay with the pdf online format of the Annual Program Book and, thus, hard-copy Annual Program Books will not be mailed to members with email addresses. Instead, members can view/download the book from the website address [www.Yodergraphics.com/ima/2017\\_ima\\_roster.pdf](http://www.Yodergraphics.com/ima/2017_ima_roster.pdf). The password is "ima 2017". The website was accessible after October 1. Members without an email address were snail-mailed a hard-copy Program Book. Members who attended the September 20 tech session meeting at the Hilton Garden Inn also received a Program Book. If you need a hard-copy of the Annual Program Book, please contact Linda Garrison at [Linda\\_Garrison@goodyear.com](mailto:Linda_Garrison@goodyear.com).

### **CMA Mentoring Program**

The Akron chapter IMA is proud to offer its members a mentoring program to assist CMA candidates with strategies to pass the CMA exam. The Akron IMA CMA Mentoring Program will encourage networking and provide career development opportunities designed to help CMA candidates (mentees) and other members (mentors) in our chapter to form valuable mentoring relationships. The success of this program will rely on volunteers to serve as mentors. Mentoring can take place online, by phone, or in person at Akron chapter events or other locations.

The CMA Designation The CMA (Certified Management Accountant) is the advanced professional certification specifically designated to measure the accounting and financial management skills that drive business performance. Achieving the CMA credential demonstrates your mastery of financial planning, analysis, control, and decision support, as well as professional ethics.

The CMA credential is:

Focused - On the critical skills you use in business

Respected - Leading employers seek to hire and promote CMAs

Valued - CMAs on average, earn higher compensation than noncertified professionals

Convenient - CMA exams are offered electronically in hundreds of locations worldwide.

**The CMA Mentoring Program** - The accreditation process leading to the CMA designation can be a rigorous experience requiring great energy and effort. The CMA candidate will have questions regarding exam content, study materials, test taking strategies, and much more. Without somebody to guide and mentor them, the candidate may become discouraged and abandon the certification program. However, through the Akron IMA CMA Mentoring Program, candidates will be able to seek and

obtain the support and guidance of fellow chapter members who have earned their CMA designation.

Mentees and mentors will be matched based on the needs of the mentee and the availability of the mentors. The ideal mentor for this CMA focused program would be an individual who has obtained the CMA certification and / or who has recently passed one or both parts of the newer two part CMA exam structure. All individuals who are currently enrolled in the CMA program and studying for the CMA exam are encouraged to enroll as a mentee. In addition, individuals who are undecided about obtaining the CMA certification and would like additional information or guidance are encouraged to enroll.

If you would like more information, please contact: Jeff Falter [jfalter@roadrunner.com](mailto:jfalter@roadrunner.com)

### Internet Reference Page

Dinner Reservations: [imadinner@hotmail.com](mailto:imadinner@hotmail.com) or (330) 904-7986

Newsletter articles: [ima\\_newsletter@yahoo.com](mailto:ima_newsletter@yahoo.com)

Employment service: [rshapiro@velosio.com](mailto:rshapiro@velosio.com) or (330) 703-9195

IMA insurance: [R\\_Showarter@hotmail.com](mailto:R_Showarter@hotmail.com) or (330) 688-7670

Akron chapter website: [akron.imanet.org](http://akron.imanet.org)

IMA National website: [www.imanet.org](http://www.imanet.org)

Login : enter user name (your IMA account number)

Enter password (last name, unless you changed your password)

Ohio Council website: [www.ohio.imanet.org](http://www.ohio.imanet.org)

Online Program Book: [www.yodergraphics.com/ima/2017\\_ima\\_roster.pdf](http://www.yodergraphics.com/ima/2017_ima_roster.pdf)

Password is ima2017

Access online recording of chapter meetings:

Contact Roy Howarter at (330) 688-7670 or [R\\_Showarter@hotmail.com](mailto:R_Showarter@hotmail.com)

Get the password from Roy

### Stay Connected

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