

President's Message

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Happy Holidays to you and your families ~



The Rochester Chapter Board

Jody Allison

*Jody Allison*

Paychex Enterprise Risk Management  
585-336-7456

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## Newsletter Info

Congratulations to Ellen Wozniak who has joined Reliant Community Credit Union as the Chief Financial Officer.

Please submit articles to Allison Beard at [allison.beard@roberthalf.com](mailto:allison.beard@roberthalf.com)

**THE IMA WANTS YOU.....**

*to increase membership!!*

Submit the names of the new members you have introduced to the IMA and win a vacation package getaway to a local resort of your choice(Value not to exceed \$350).

***How do I win the fabulous prize?***

Network with local professionals and introduce them to the IMA. Once they become a new member, e-mail the persons name to Jody Allison at [jallison@paychex.com](mailto:jallison@paychex.com) and put in the subject line "Membership Contest." The contest runs through April 30 and the winner will be announced at the May meeting.



Rules:In order to win, the person must submit at least 2 new members.

If you know someone who may be interested in membership information, please forward referrals to Mark Pautler, Director Member Retention  
585-381-7350  
[mpautler@advantageprofessionals.com](mailto:mpautler@advantageprofessionals.com)

**2007/2008  
SCHEDULE OF ACTIVITIES**

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**Telephone: 585-251-5194  
Website: [www.imarochester.org](http://www.imarochester.org)**

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**February 27, 2008** – Enterprise Risk Management and Fraud

7:30 a.m. – 4:30 p.m.; Midvale Country Club

**May 14, 2008** – IMA Awards Night

5:00 p.m.; Burgundy Basin Inn

**Institute of Management Accountants Board Meetings  
2007-2008**

**Welcome to the IMA 2007-2008!**

**Board meetings will be held on the following dates at noon:**

**January 16**

**March 19**

**April 9**

**May 14**

**These are the dates for the Board meetings this year. They will all be conducted by conference call and the Secretary will be sending the conference call number prior to the meetings. Any member wishing to attend can contact a Board member for the information.**

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***VOLUNTEERS NEEDED***

**IMA Volunteers Support Lifespan**

*Lifespan* supports a variety of services for the elderly. It is located at 1900 South Clinton Ave. Financial Management services include budgeting, bill paying, reconciling bank accounts, filing health insurance claims and financial information for applications for renewal of rent subsidies, Medicaid and food stamps. Volunteer Financial Managers also fend off those who would take advantage of the client's physical condition.

Volunteering with *Lifespan* qualifies as an IMA community service project. Several members of the Rochester Chapter IMA have been volunteering with Lifespan for several years. Talk to, or call Ray Koenig, Jim Borden, Dick Stryker or Ellen Wozniak for their personal viewpoints on the program.

There is an urgent need for more volunteers to serve a backlog of elderly persons waiting for assistance. Orientation seminars are held periodically for new volunteers. If you would like to volunteer your time and talents to make a positive difference in an elderly person's life, please call *Lifespan* at (585) 244-8400.

**Your Rochester IMA Chapter has partnered with Gleim Publications to ensure your success on the CMA exam! Working together, we will provide you the necessary study tools to prepare for these difficult exams.**

Gleim provides an extensive self-study course for the CMA exam. Our most successful candidates use the Complete CMA System with Gleim Online. This system combines books, the Test Prep CD-ROM, audio reviews, CMA Gleim Online and a Personal Counselor (a real live person!) to maximize your available study time. Because Gleim identifies and focuses on your weak areas, you will not spend any more time preparing than is necessary to guarantee success. The Complete CMA System with Gleim Online GUARANTEES that you will pass each part the first time.

As a member of the chapter, you are eligible for significant discounts (from 20%-32%) on any of Gleim's CMA materials, as well as Gleim's Online CPE. To take advantage of the reduced prices, please contact our chapter representative, Matthew Cmar.

By phone: (800) 874-5346, ext. 135

By email: [matthew.cmar@gleim.com](mailto:matthew.cmar@gleim.com).

By fax: (888) 375-6940, attn: Matthew Cmar

**INSTITUTE OF MANAGEMENT ACCOUNTANTS  
ROCHESTER CHAPTER**

**2007-2008 BOARD OF DIRECTORS**

<b><u>PRESIDENT</u></b>	Jody Allison
<b>Historian</b>	Ray Koenig
<b><u>V.P. Administration</u></b>	Lisa Filio
<b><u>Secretary</u></b>	Aretta Stillman
<b><u>Associate Director Secretary</u></b>	Ted Locke
<b><u>Treasurer</u></b>	David Alkins
<b><u>Associate Director Treasurer</u></b>	Tanya Lomac
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<b>Dir. Mem. Retention</b>	Mark Pautler
<b>Dir. CMA/CFM</b>	Curtis Heatherman
<b>Dir. Manuscripts</b>	Harry Howe
<b><u>V.P. Communications</u></b>	Stephanie Quattrone
<b>Dir. Yearbook &amp; Advertising</b>	Jill Knittel
<b>Dir. Publicity / Employment</b>	Bill Hart
<b>Dir. Newsletter/Website</b>	Allison Beard
<b>Associate Director Newsletter/Website</b>	Beth Camann
<b>Upstate Council</b>	Toni Spina
<b>Dir. Programs</b>	Roberta Klein

# **JOB POSTING #1**

## **Assistant Controller**

### **This is a confidential job posting.**

We are a leading, global manufacturer with a unique opportunity for an energetic Assistant Controller in our Rochester, NY facility.

We are seeking an ambitious, energetic Senior Accounting Professional looking for a company to grow with! This key, highly visible position will be responsible for Financial Closing, Financial Reporting, Cost Accounting, and various other Accounting functions. This position will provide a path to career advancement for a dynamic and talented candidate.

#### **KEY RESPONSIBILITIES:**

- Prepare and analyze monthly, quarterly and annual financial reports and statements.
- Assist with month, quarter, and year-end financial closings
- Analyze fixed assets
- Assist with annual budgeting and monthly forecasting
- Apply principles of cost accounting to conduct studies to provide detailed cost information including job costing, standard cost, variance analysis, labor distribution, direct labor & absorption, inventory analysis and physical inventory
- Insure compliance with GAAP and SOX
- Compile complex reports using MS Office
- Conduct credit and collections activities
- Work closely and effectively with multiple levels of the organization
- Handle workload accurately and quickly while under pressure

#### **REQUIREMENTS:**

- Desire to rapidly advance your career into higher business management positions, and whose past experiences will demonstrate that potential.
- Bachelor's degree in Accounting with 5-10 years experience in a manufacturing environment. MBA or CPA is a plus.
- Thrive in a fast past paced team environment with excellent time management skills.
- Receptiveness to relocation opportunities within our corporate structure.

Our competitive corporate benefits include medical, dental, vision, life insurance, short and long term disability, and 401(k) with company match. We value diversity within our corporate culture.

Please forward resumes with "Assistant Controller" in the subject line to Bill Hart ([bhart@rocheste.gannett.com](mailto:bhart@rocheste.gannett.com)) at the IMA and they will be forwarded to the employer.

## **JOB POSTING #2**

### **Manager, Rating (Health Care Pricing)**

The MANAGER, RATING is responsible for reviewing work from the rating staff for accuracy and understanding. Rating staff is responsible for pricing experience rated health care premiums for Excellus. As a manager you will be required to interact with company sales representatives, accounts, brokers and consultants regarding rate development and trend explanations; conduct rate and benefit negotiations; manage and train in development of process improvements utilizing system and software applications to full potential; and assist in the enforcement of Underwriting guidelines.

Minimum Qualifications: BS in Finance, Accounting, Math, Economics or Actuarial Science, and has 5 to 7 years experience with proven ability to effectively manage large complex projects and staff (preferably in the health care or insurance industry). For a complete job description and list of qualifications please see the posting on our web site at [www.excellusbcs.com](http://www.excellusbcs.com)

## **JOB POSTING #3**

### **Team Leader, Rating (Health Care Pricing)**

Under the direction of the Manager/Director, coordinates the daily activities of the staff analysts. Works within policy guidelines, organizes individual projects and, in conjunction with the Manager/Director, assists in the resolution of usual or unique problems facing the department. Additional responsibility includes reviewing work from Rating/Renewal staff for accuracy and understanding, as well as conducting annual performance reviews.

Minimum Qualifications: BS in Finance, Accounting, Math, Economics or Actuarial Science and 6 years of experience in healthcare and/or health insurance field with demonstrated ability in actuarial science or rating and underwriting. For a complete job description and list of qualifications please see the posting on our web site at [www.excellusbcs.com](http://www.excellusbcs.com)

## **JOB POSTING #4**

### **Rating and Renewal Analyst (Health Care Pricing)**

This is a pricing position in the Health Care field responsible for new business rate proposals utilizing available claim information provided from prospect accounts through sales. Also develop renewal rates for existing group accounts utilizing claim, premium and enrollment information extracted from Excellus systems. Prepare stop loss quotes and complex group reports to assist sales in the retention of accounts. Interact with company sales representatives, accounts and consultants regarding rate and trend explanations and rate negotiations. Propose and assist in the development of process improvements utilizing system and software applications to full potential.

Minimum Qualifications: BS in Finance, Accounting, Math, Economics or Actuarial Science; possess knowledge specific to the healthcare industry; be proficient in MS Excel and MS Word; experience with databases and database interfaces. For a complete job description and list of qualifications please see the posting on our web site at [www.excellusbcs.com](http://www.excellusbcs.com)

For any of these positions apply on line or contact Susan Galletto at [Susan.Galletto@excellus.com](mailto:Susan.Galletto@excellus.com).



**ROCHESTER CHAPTER, IMA  
SERVICE YEAR 2007-2008  
OFFICERS AND DIRECTORS**

<b>Position</b>	<b>Name</b>	<b>Work Phone</b>	<b>email address</b>
President	Jody Allison	336-7456	<a href="mailto:jallison@paychex.com">jallison@paychex.com</a>
VP of Administration	Lisa Filio	546-2040 ext 248	<a href="mailto:lfilio@res-exhibits.com">lfilio@res-exhibits.com</a>
Secretary	Aretta Stillman		<a href="mailto:aretta.stillman@yahoo.com">aretta.stillman@yahoo.com</a>
Treasurer	David Alkins	544-0450 ext 441	<a href="mailto:david_alkins@yahoo.com">david_alkins@yahoo.com</a>
Dir of Information Tech.	Steve Schiano	254-7510	<a href="mailto:sschiano@immediatemailingwny.com">sschiano@immediatemailingwny.com</a>
Dir Communications	Susan Glenz	381-4900 ext2213	<a href="mailto:susan.glenz@sentrysafe.com">susan.glenz@sentrysafe.com</a>
VP Programs	Peter Szczesniak	340-8846	<a href="mailto:peter.szczesniak@PAETEC.com">peter.szczesniak@PAETEC.com</a>
VP Communication	Stephanie Quattrone	336-6444	<a href="mailto:squattro@paychex.com">squattro@paychex.com</a>
Assoc Dir Newsletter	Beth Camann	899-2088	<a href="mailto:bcamann@screenvision.com">bcamann@screenvision.com</a>
Assoc Dir Secretary	Ted Locke	393-5921	<a href="mailto:ted.locke@cwine.com">ted.locke@cwine.com</a>
Dir Member Retention	Mark Pautler	381-7350	<a href="mailto:mpautler@advantageprofessionals.com">mpautler@advantageprofessionals.com</a>
Dir CMA/CFM	Curtis Heatherman	768-2136	<a href="mailto:curtis_heatherman@hotmail.com">curtis_heatherman@hotmail.com</a>
Dir Manuscripts	Harry Howe	245-5465	<a href="mailto:howeh@geneseo.edu">howeh@geneseo.edu</a>
Dir Yearbook/Advertising	Jill Knittel	399-0650 ext24	<a href="mailto:jknittel@worldleadersjobs.com">jknittel@worldleadersjobs.com</a>
Assoc Dir Treasurer	Tanya Lomac	423-1860 ext 3233	<a href="mailto:tlomac@mmb-co.com">tlomac@mmb-co.com</a>
Dir Newsletter	Allison Beard	232-6055	<a href="mailto:allison.beard@roberthalf.com">allison.beard@roberthalf.com</a>
Dir Publicity/Employment	Bill Hart	258-5620	<a href="mailto:bhart@rocheste.gannett.com">bhart@rocheste.gannett.com</a>
Dir Programs	Roberta Klein	548-2648	<a href="mailto:rklein@cob.rit.edu">rklein@cob.rit.edu</a>
Upstate Council	Toni Spina	427-8900 x5167	<a href="mailto:spina@efpCPA.com">spina@efpCPA.com</a>
Historian	Ray Koenig	377-2838	<a href="mailto:ray30k@frontiernet.net">ray30k@frontiernet.net</a>

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**IMA's landmark research study revealing Sarbanes-Oxley (SOX) compliance issues is now available!** The study assesses the views of nearly 400 experienced CFOs, controllers,

Institute of Management Accountants

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(800) 638-4427

2007/2008 Key Contacts

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Member Services Representative – Kinsey Jenkins  
**IMA National Website**

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

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City/State/Zip \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_ E-mail \_\_\_\_\_

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I prefer to stay with my present chapter \_\_\_\_\_. I prefer to affiliate with the \_\_\_\_\_ Chapter.

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(National requires your signature for any changes)

Please send all IMA correspondence to my: Business Address \_\_\_\_\_ Home Address \_\_\_\_\_

Please send this form to: **IMA Rochester Chapter PO Box 41152 Rochester, NY 14604**