

President's Message

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Hello Everyone!-

I hope everyone enjoyed the summer and is ready to catch up with their fellow professionals! The Board has been hard at work on many different things and here are the updates.

Our 2007-2008 programs are listed within the newsletter. Our first meeting will be Thursday, October 25 and we hope to see you there!

The year book is currently under construction and I hope that you will all enjoy it. You should see this delivered to you in mid-October. Thanks to Jill Knittel and all of her hard work.

Postcards will once again be used to remind people about the meetings. Watch for them in your mailbox.

Board meetings for the year are included in the newsletter. They will all be conference call and at noon on the days specified.

During the summer, we conducted a survey of the membership. We will post our results on the website.

The Director of CMA Programs will be scheduling an event to get people together for networking that are interested in taking the CMA exam. People who have completed the exam will also be present for the purpose of gaining best practices.

Once again, the Board of the IMA looks forward to serving the membership. Please make sure that you update your information on the National website. This is the information we use to communicate with you. Thanks for your input and keep it coming.

Jody Allison

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Newsletter Info

Gary Bucholtz has joined Nukote International as Assistant Controller

David E. Alkins has joined Quality Vision International, Inc. as
Assistant Controller.

Please submit articles to Allison Beard at 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 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

**2007/2008
SCHEDULE OF ACTIVITIES**

Telephone: 585-251-5194
Website: www.imarochester.org

October 25, 2007 – Student Night – Joint meeting with IIA 5:15 p.m.; Burgundy Basin Inn

November 8, 2007 – Tax Update 8:00 a.m. – 12:00 noon; Pittsford Library

December 5, 2007 – Holiday Event Board of Directors Holiday Lunch (Board members only)

11:30 a.m.; Mario's Italian Steakhouse

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**

Welcome to the IMA 2007-2008!

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

September 19

October 17

November 14

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.

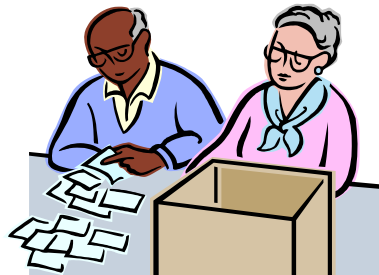
VOLUNTEERS NEEDED

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.

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

**INSTITUTE OF MANAGEMENT ACCOUNTANTS
ROCHESTER CHAPTER**

2006-2007 BOARD OF DIRECTORS

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

JOB POSTING #1

POSITION DESCRIPTION

Position Title: Accountant – Part Time (20-24 hours/week)

Department: Finance/Operations

Responsible To: Chief Financial Officer

PURPOSE

To administer the bank's fiscal recordkeeping and bank financial reporting.

PRIMARY RESPONSIBILITIES

Perform the reconciliation and control of general ledger accounts including:

- Loan and deposit WIP and unposted accounts
- All due from bank accounts (including Federal Reserve)
- Bank fixed assets
- Accrued and prepaid expenses
- Investment Portfolio
- Bank official check accounts
- Loan Payments Receivable
- General Ledger Suspense accounts
- Mortgage Loan Suspense
- Other accounts, as assigned

Maintain accounting and collateral records for the bank's investment portfolio.

Collect and maintain account reconciliations performed by other bank departments.

Assist in preparation of quarterly responsibility center profitability reports.

KNOWLEDGE/EXPERIENCE REQUIRED

EDUCATION: Requires a professional level of knowledge equivalent to that which is acquired through associate's degree level college training (e.g. Accounting, Finance, Business Administration, etc.).

EXPERIENCE: Three to five years in bank financial/operations capacity desired.

OTHER: Excellent PC skills; experience with AS400 query or similar report writing software desired; general knowledge of bank loan and deposit processing applications

Date Last Updated: August, 2007

E- Mail resume to glorumj7@hotmail.com

JOB POSTING #2

Business Intelligence Analyst

Location: Rochester, NY

Paychex, Inc. is a leading national provider of payroll, human resource, and benefits outsourcing solutions for small- to medium-sized businesses. Paychex was founded in 1971. With headquarters in Rochester, New York, the company has more than 100 offices and serves more than 522,000 clients nationwide. FORTUNE magazine rated Paychex one of "100 Best Companies to Work For" in America three straight years (2002-2004). We are currently seeking "Great People for this Great Opportunity."

Specific Responsibilities:

- Working in a team environment to create various enterprise risk management reports to be published to management, including the officer team.
- Developing and maintaining interpersonal relationships with internal team members to gather and maintain information for accurate reporting.
- Designing, developing, and delivering end-to-end data solutions by gathering and analyzing business requirements to be used in developing logical data models.
- Designing data gathering logic and user interfaces.
- Designing, developing, and implementing end user applications in Microsoft® Access™ and Business Objects™ that gather and present data efficiently and accurately.
- Developing production reports and dashboards by defining user requirements and functional specifications.
- Designing, developing, and implementing reports within the corporate data warehouse.
- Developing process improvements to increase reporting efficiency and accuracy while decreasing the time needed for report production.
- Creating and maintaining process procedure documentation.

Position Requirements:

Bachelor's degree in Accounting, Business, Finance, Information Technology, or a related field; along with 5 to 7 years of related experience. Qualified candidate should be proficient in Microsoft Access, to include VBA and SQL as well as Excel®, Business Objects, and Crystal Reports®. Strong analytical skills are also required. Experience in accounting or financial reporting is preferred along with data warehousing, corporate collections, accounts receivable, predictive modeling, credit analysis, or credit scoring.

To Apply:

If you are interested in applying for this opportunity, please visit our website at www.paychex.apply2jobs.com and reference position code CORP5711.

EOE

Must be authorized to work in the U.S.

Student Night - Thursday October 25th

Managing Your Career

When	5:15 p.m. Networking Reception 6:00 p.m. Dinner 6:40-7:30 Speaker
Where	Burgundy Basin Inn 1361 Marsh Road Pittsford, NY 14534
Cost ELM's	Standard cost for professionals, guests, Students' cost \$15 (\$5 for students who register by 10/19/2007)
Topic	Managing Your Career



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

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



Certified Management Accountant Program
Certified In Financial Management Program

Forwarding Address Correction Requested

Rochester Chapter Institute of Accountants
PO Box 41152
Rochester, NY 14604

Send To:

2006 - 2007 Key Contacts		
Upstate Council President – Jack Lorenz	716.372-3111	jlorenz@alcas.com
Member Services Representative – Kinsey Jenkins	800.638.4427 ext 1580	Kjenkins@imanet.org
IMA National Website		www.imanet.org

INFORMATION UPDATE (Please Print) Update your information online at www.imanet.org

Dr. ___ Mr. ___ Mrs. ___ Ms. ___ Professional Designation _____ Account # _____

Last Name _____ First Name _____ MI _____

New/Current Business
Name _____

Address _____

City/State/Zip _____

Phone _____ Fax _____ E-mail _____

New Home:
Address _____

City/State/Zip _____

Phone _____ Fax _____ E-mail _____

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

Your signature _____ Date _____
(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**