

President's Message

Hello everyone!

The Board has been very busy in January planning some great events for the last half of the year. There will be an educational seminar on the CMA program/exam for students and professionals on Wednesday, April 9 from 6:00 - 8:00 pm in Clark B & C of the Alumni Student Union at RIT. If you have interest in taking the exam and would like to learn more save the date. There will be additional information on the website and in the March newsletter. Come and network with your fellow professionals who are going to take the exam. We will cover study methods and you will be able to talk to individuals who have recently passed the exam. Stay tuned for an opportunity to take a two hour ethics session in late April/ early May. Many people need this for CPE requirements. We will announce details in the next newsletter. This will be followed by our final dinner meeting(awards night) on May 14th.

The details on the February 27th meeting are enclosed in this newsletter and this is a huge event! We have great speakers and it is a very cost effective way to earn your CPE. We look forward to seeing you there!

I am pleased to announce that the December results indicated that we are 22 in the rankings in our division as a Chapter! This is great news and something we can all be proud of. I look forward to seeing each one of you at the remaining meetings for the year.

Jody Allison

Paychex Enterprise Risk Management
585-336-7456

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Newsletter Info

Cheryl L. Yawman has been elected President of the Rochester chapter of the New York State Society of Certified Public Accountants.

Kelly Lang has joined Nukote International as a [Financial Analyst](#).

Earl Johnson has joined Strong National Museum of Play as Vice President for Finance & Operations.

Aretta Stillman has joined Arnold Magnetics Technologies as a Senior Accountant

Welcome to new IMA Members

Mr. Douglas W. Abbott - [Student](#) - State Univ. of New York Empire State College

Ms. Angela M. Bonilla - Xerox

Dr. Ottalee Schiffler - SUNY Geneseo

Mr. Gregory R. Gottorff, Jr. - [Student](#) - Saint John Fisher College

Mr. Bryan Gray - [Student](#) - State Univ. of New York College at Brockport

Mr. Yerzhan Kadyrsizov - [Student](#)

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

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2007/2008 SCHEDULE OF ACTIVITIES

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

The Institute of Management Accountants and the Institute of Internal Auditors announce the following joint meeting:

Topic: Enterprise Risk Management/Fraud - The Latest Trends

When: February 27, 2008

Where: Midvale Country Club
2387 Baird Road
Penfield, NY 14526

Cost: Attendees may choose when they attend. They can purchase 2, 4 or 8 hours of CPE.
2 hours with Breakfast or Lunch - \$25 Members/\$30 Guests/\$20 Student or ELA
4 hours with Breakfast and/or Lunch - \$40 Members/\$45 Guests/\$35 Student or ELA
8 hours with Breakfast and Lunch - \$50 Members/\$60 Guests/\$45 Student or ELA

**Student rate applies to full time students or faculty only

Continental breakfast includes assorted muffins, danish, croissants, fresh fruit and coffee/tea/juice
Lunch will be a soup and sandwich combo buffet style, including assorted deli meats, fresh fruit, pasta salad and dessert

Make reservations by Friday, February 22 by calling into our reservation line at 251-5194 or log onto our website at www.imarochester.org. Please be sure to indicate which sessions you will be attending and whether you want lunch or breakfast! This is a must!

Agenda:

7:30 a.m. - 8:00 a.m. - Breakfast
8 a.m. - 9:40 a.m. - "Enterprise Risk Management Panel Discussion" - Session 1
9:40 a.m. - 10:00 a.m. - Break/Networking
10:00 a.m. - 11:40 a.m. - "Data Security" - Session 2
11:40 a.m. - 12:30 p.m. - Lunch
12:30 p.m. - 2:10 p.m. - IRS - "Financial Criminal Investigations"- Session 3
2:10 p.m. - 2:30 p.m. - Break
2:30 p.m. - 4:10 p.m. - FBI- "Current Trends in White Collar Crim/Cyber Crimes Program"/Corporate Fraud Investigator -
"Internal/External Fraud Prosecution" - Session 4

Session Presenter Information

Enterprise Risk Management Panel

**Frank Fiorille - Director of Enterprise Risk Management
Psychex, Inc.**

Patrick M. Sheller

Chief Compliance Officer & Assistant Corporate Secretary
Eastman Kodak Company

Patrick M. Sheller is Chief Compliance Officer and Assistant Corporate Secretary of

HELP THE LOCAL ROCHESTER CHAPTER OF THE INSTITUTE of MANAGEMENT ACCOUNTANTS RECORD ALL OF YOUR EFFORTS!

Did you know that the local chapter gets competition points for National Awards and compensation when you study for the CMA exam? Did you know that we get credit for your participation at the National Conference?

Study time (self study or prep course) can be counted for chapter credit. There is a maximum of 50 hours per part and must be requested when member is studying for exam. Can not request credit for study time for any exam part passed prior to this competition year.

Specific examples:

- Chapter Educational meetings of any length.
- Professional Development (PD) programs of chapters and regional councils (including cosponsored programs)
- Attendance at IMA Annual Conference Education Sessions
- Successful completion of course offerings from the Lifelong Learning Center (LLC)
- Education achieved when pursuing certification (see Certification... below)
- Participation in any educational program provided by or co-sponsored by the Montvale office of IMA, including self study programs and educational webcasts.
- Participation in any structured CMA/CFM Review Program (class time only).
- CMA/CFM Self-Study Courses may qualify for equivalent CPE. Hours claimed may not exceed those printed as “recommended study hours” in vendor study materials. Requested support requires a copy of the vendor’s published self study guideline.
- 5 hours of equivalent CPE per part taken of the CMA/CFM (automatically recorded)
- 30 hours of equivalent CPE Part 1-3-4 passed of the CMA/CFM (automatically recorded)
- 40 hours of equivalent CPE Part 2 passed of the CMA/CFM (automatically recorded)

The first step is going on to the National web site and updating your efforts under your login. If you are struggling with this, please call the IMA phone number at 251-5194 and leave your full name, phone number and your most recent CPE efforts. We will help you record them or answer any questions that you may have. Any regularly scheduled IMA meeting will be logged for you.

Thanks!

Jody Allison

Attention IMA Members!

It is very important to update your information at National when you have a change in your personal information. You can do this by contacting National at 1-800-638-4427 or logging on to their web site at ima@imanet.org. This information is used by National and the local chapters to communicate with you. Remember - it is not just your address or phone number, but also the company you work for or your job title. Thanks for your help!

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

2007-2008 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
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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. Programs	Roberta Klein

JOB POSTING #1

Accountant

RES Exhibit Services an award-winning full service custom exhibit manufacturer is looking for an Accountant to join our team.

Principle duties and responsibilities of this position will include:

- Monthly reconciliation of general ledger accounts and preparation of journal entries
- Auditing of accounts payable invoices and monthly credit card statements as required
- Assisting Controller in month-end closing & financial statement preparation
- Maintain & reconcile fixed asset schedules
- Preparation of daily cash management schedules
- Monthly bank reconciliations
- Preparation of monthly and quarterly sales tax returns
- Company wide travel & expense reporting administration
- Maintaining Billing and Accounts Receivable schedules related to production
- Back up to Billing Specialist as required
- Assisting in other Financial department duties and projects as assigned

The ideal candidate will possess the following qualifications:

An Associates degree or equivalent work experience in Accounting or Business.
A minimum of 4 years general accounting experience preferably in a job costing/multi-company environment.

Strong analytical and problem solving skills

Advanced proficiency in Microsoft Excel and other Microsoft office applications

Exceptional organization skills and attention to detail

Strong communication and interpersonal skills

A self-starter with excellent time management skills

We offer competitive compensation and excellent benefits. To learn more about this opportunity, please forward resume and salary requirements to dmooney@res-exhibits.com, or fax to 585-546-7125.

JOB POSTING #2

A local manufacturing/services company is currently seeking a Billing/Accounts Receivable Specialist to join our dynamic and growing company.

Responsibilities:

- Preparation of all client invoicing within established timelines
- Entry of accurate sales postings in accounting system
- Prepare, maintain and reconcile all sales and sales tax related journals
- Coordination among and interaction with multiple departments to insure accurate and timely billing and discrepancy resolution/inquiries
- Maintains a thorough working knowledge of billing and job cost estimates and all client specific contract and billing terms
- Responsible for client collections and all aspects of A/R resolution management
- Preparation of monthly accounts receivable statements
- Evaluate credit worthiness of potential customers and recommendations for terms
- Processing credit card payments and maintaining accompanying payment schedules
- Application of all payments in accounting system
- Prepares A/R aging reports and coordinates forecasting with the Controller

Qualifications - The ideal candidate will possess:

- Minimum of an Associates Degree in Accounting or Business
- 2 years prior billing experience preferably in a job cost environment
- Minimum of 2-4 years experience in collection of past due receivables and customer credit review
- Superior working knowledge of MS Word & MS Excel
- Strong communication and organizational skills
- Excellent customer service, customer relations and negotiation skills
- Experience with basic legal issues such as bankruptcies, liens and judgments preferred
- Ability to prioritize and manage multiple tasks and tight deadlines
- MAS 90 experience a plus

Please email resumes to bhart@rochester.gannett.com and they will be forwarded to the employer.



**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 Communications	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 Programs	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

As always, we welcome any feedback on how IMA can improve our service to students. If you have any questions/comments/recommendations, please contact Jodi Ryan, Manager – Student and Academic Relations at 800-638-4427 x1556 or jryan@imanet.org.

Unsubscribe

To unsubscribe from IMA e-mail, please e-mail imacommunications@imanet.org with the words "unsubscribe IMA e-mail" in the body of the message. Please include your IMA membership number as well for a more timely response.

2007/2008 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

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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**