

President's Message

Hello,

I hope that everyone is recovering well from their Holiday activities! This is always such a busy time of year and the IMA has worked hard to tailor our next meeting to fit into your schedule.

The next meeting will be held on February 27th and will be an all day session. Members and guests can attend 2, 4 or 8 hours of programming based on specific needs. Please take a moment to scan the details on Page 3 of the newsletter.

The price for the program makes it a very inexpensive way to attain CPE credits! We have already lined up many notable speakers. Watch the website and February newsletter for the details. We will have members from the FBI, IRS and the Director of Enterprise Risk Management for a local company has offered to participate in our panel discussion. His organization just won four Alexander Hamilton awards for operational excellence in Treasury & Risk magazine. Stay tuned!

As always, make sure that you log on to the National IMA site to update your personal information. This is where we get our information to contact you.

We miss seeing you at meetings! Make February a time to reconnect with your professional network.

See you in February!

Jody Allison

Jody Allison

Paychex Enterprise Risk Management
585-336-7456

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|------------------------------|--------------------------|---------------------------|---------------------------------------|--|
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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 Schiffel -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

2007/2008 SCHEDULE OF ACTIVITIES

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

February 27, 2008 – The Institute of Management Accountants and the Institute of Internal Auditors announce the following joint meeting:

Topic: Enterprise Risk Management/Fraud - The Latest Trends

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

Agenda:

7:30 a.m. - 8:00 a.m. - Breakfast

8 a.m. - 9:40 a.m. - Enterprise Risk Management Panel Discussion

9:40 a.m. - 10:00 a.m. - Break/Networking

10:00 a.m. - 11:40 a.m. - Data Security

11:40 a.m. - 12:30 p.m. - Lunch

12:30 p.m. - 2:10 p.m. - IRS Criminal Investigations

2:10 p.m. - 2:30 p.m. - Break

2:30 p.m. - 4:10 p.m. - Fraud - 2 Topics - Recent trends in White Collar/Cyber Crimes - FBI

Prosecution - What does your company do when you are a victim - Corporate Fraud Investigator

This is a great program and watch the website and next newsletter for the impressive list of presenters!

May 14, 2008 – IMA Awards Night

5:00 p.m.; Burgundy Basin Inn

Institute of Management Accountants Board Meetings 2007-2008

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

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.

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 |
| Dir. Information Tech. | Steve Schiano |
| Dir. Communications | Susan Glenz |
| <u>V.P. Programs</u> | Peter Szczesniak |
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| 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. 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

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|---|-----------------------|--|
| 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**