

**President's Message**

Hello everyone!

Another chapter year is winding down and we find ourselves in a great spot. I am pleased to announce that as of the February competition reports we are in 19th place. Great job everyone!

We have two very exciting events coming up! On April 9th, we will be having a panel discussion for professionals and students on the CMA program at RIT. In May, we will be having our final dinner meeting where we will be recognizing years of service to the Chapter, people who have earned their CMA in the last year and Past Presidents. Details for both events are available on our website and in this newsletter. We hope to see you there!

If you are interested in serving on the Board of the Rochester Chapter for next year, please contact any current Board members.

I look forward to seeing you soon!

Jody

*Jody Allison*

Paychex Enterprise Risk Management  
585-336-7456

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## Newsletter Info

Join us in welcoming new member **Lorraine K. Scarrott** who works at Ontario County

**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](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)

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# 2007/2008 SCHEDULE OF ACTIVITIES

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

## The Rochester Chapter of IMA presents CMA Night

Are you interested in finding out what it takes to become a Certified Management Accountant (CMA)?

Would you like to learn some tips for studying for the CMA exam?

If you answered “Yes” to either of these questions, then this meeting is for you! Whether you’re an accounting professional or an accounting student, you can have all your questions about becoming a CMA answered by local CMA’s.

**Come Join the IMA for an evening full of fun, networking, and knowledge!**

**Date:** *Wednesday, April 9, 2008*

**Place:** *Clark B Room in the Student Union at RIT,  
One Lomb Memorial Dr. off Jefferson Rd.*

**Time:** *6:00 – 8:00 pm*

**Cost:** *FREE!!*

**Menu:** *Pizza*

Reservations are required. To make a reservation, call 251-5194 by Friday, April 4.

For more information about this meeting, for a map of the RIT campus, or to request a sign language interpreter, please e-mail Roberta Klein at [rklein@saunders.rit.edu](mailto:rklein@saunders.rit.edu).

**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:**

**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](mailto: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!

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

### **Financial Analyst**

#### **JOB SUMMARY**

Provide support and analytical assistance within the accounting department function.

#### **ESSENTIAL FUNCTIONS**

- Prepares, verifies, and controls the entering of various journal entries, closing entries, and other tasks associated with the general ledger and month-end close.
- Reconciles various general ledger accounts.
- Prepares and/or compiles information for the monthly reporting package; collates and distributes to management team.
- Monitors and prepares detail analysis of selling, general and administrative expenses for forecasting and reporting.
- Perform other analysis projects as required, such as customer and product line profitability.
- Developing financial/analytical reports using AS400 computer system.
- Preparation of sales/use and property tax filing.
- Completing various Census Bureau reporting requirements.
- Special Projects and other related duties as assigned.

#### **JOB QUALIFICATIONS**

- Bachelor's degree in Accounting.
- 3-5 years experience in public accounting preferred.
- CPA and/or MBA preferred.
- Proficiency in all Microsoft applications.
- Excellent organizational and communication skills

Apply online at [www.nukote.com](http://www.nukote.com) or email resume to [Kathryn.dehm@nukote.com](mailto:Kathryn.dehm@nukote.com)

## **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](mailto:bhart@rochester.gannett.com) and they will be forwarded to the employer.



**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>

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](mailto:jryan@imanet.org).

**Unsubscribe**

To unsubscribe from IMA e-mail, please e-mail [imacommunications@imanet.org](mailto: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	<a href="mailto:jlorenz@alcas.com">jlorenz@alcas.com</a>
Member Services Representative – Kinsey Jenkins	800.638.4427 ext 1580	<a href="mailto:kjenkins@imanet.org">kjenkins@imanet.org</a>
<b>IMA National Website</b>		<b><a href="http://www.imanet.org">www.imanet.org</a></b>

**INFORMATION UPDATE (Please Print) Update your information online at [www.imanet.org](http://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**