

**President's Message**

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Hello.

We started off the year with a great meeting. Worldleaders presented "Managing your Career" and Advantage Professionals was the featured vendor for the evening. We partnered with the IIA and 89 people attended the meeting.

Please update your personal information on the National Website. We use this information to communicate with you throughout the year!

A few things to watch for.....

The "Young Professionals" of various organizations are getting together for happy hour periodically. The next one is at TAPAS on November 29th. Watch the web site for details.

Curtis Heatherman, CMA Director, will be scheduling a gathering for people interested in taking the CMA exam. This will include some members who have already completed the exam. We hope you take advantage of this opportunity. Watch the newsletter and website for details.

Have a great Thanksgiving with your families and friends!

Jody Allison

*Jody Allison*

Paychex Enterprise Risk Management  
585-336-7456

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## Newsletter Info

Congratulations to our chapter President, Jody Allison, was selected by the Rochester Business Journal as a 40 under 40 award recipient for 2007!!!!

Jill Knittel has recently joined Worldleaders, Inc. as a Partner. Worldleaders specializes in recruiting and search services in Accounting, I/T, H/R, Manufacturing, Marketing and Sr. Leadership positions.

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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**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 2007-2008**

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

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

**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.**

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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
<b>Dir. Information Tech.</b>	Steve Schiano
<b>Dir. Website/Newsletter</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. Academic Rel.</b>	Roberta Klein

## **JOB POSTING #1**

### **Job Description**

Controller needed for fast growing optical media company headquartered in Rochester, NY with a manufacturing facility in Fort Mill, SC

### **Requirements:**

Minimum of 10 years of business experience in small to medium size companies

Experience in financial reporting, business planning, strategy, capital procurement

Team player with positive attitude

Proven track record

Bachelor degree required

Strong background in Great Plains and other financial systems.

### **Responsibilities:**

Overall Great Plains management

A/R, A/P, Cash Management, Credit, General Ledger

Accounting/finance administration focus

No supervision

Projects: document preparation

### **Other:**

90 day part time assignment with 20 hours per week of flexible schedule.

Choose from 4 days @ 5 hrs or 5 days @ 4 hrs

Opportunity for a full time position after the first 90 days.

**Company is looking for its next CFO. The right candidate can quickly advance to that level.**

**All inquiries should be directed to:**

**Ted Kachris, President & CEO at [tkachris@mediamethods.com](mailto:tkachris@mediamethods.com)**

**Or by calling 585-598-8040 Ext. 100**

## *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](http://www.paychex.apply2jobs.com) and reference position code CORP5711.

EOE

Must be authorized to work in the U.S.



**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 Newsletter/Website	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 Academic Relations	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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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**