



A publication of the Savannah Chapter of the Institute of Management Accountants

<http://www.savannah.imanet.org>

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President’s Message

*Adrian Brasher Jay
Chapter President*

President’s Message
January 2016
Adrian Jay, MAcc
President, Savannah IMA

A new year is already well underway, and I am very excited about everything the IMA Savannah has in store for 2016. I am humbled by all of the commitment and service demonstrated this year by our board members. Thank you to all our volunteers, who help run monthly chapter meetings and help with the administration work that takes place behind the scenes in order to operate a local chapter in a global organization. Your contributions have directly impacted this chapter’s success!

During 2015 we gained so much knowledge through our monthly lunch and learn meetings. One of the greatest advantages of these meetings, which I have recognized over the years, is the opportunity to share knowledge and experiences with professionals from a variety of industries, in an informal face to face environment. Some of the key benefits of attending monthly meetings include, professional development, career enhancement, improved relationships with other professionals, and different educational opportunities.

By attending meetings frequently we are investing in our local IMA community. The Savannah IMA provides scholarships to accounting and finance students, which gives us an opportunity to give back to our profession. Our speakers are some of the best in the area, who deliver brilliant presentations. The continuing education credits we receive make us more valuable to our employers.

This year we have a special CPE event planned for Friday, May 20th. The plans are still coming together, but Mr. Excel, Bill Jelen, will be our primary speaker for the event. Mr. Excel has written 43 books and is a very well-known, impactful speaker. His books include: Excel Gurus Gone Wild, Pivot Table Data Crunching, and Power Pivot Alchemy. For our CPE event he will be presenting on, “Advanced Data Analysis Using Excel”.

The CPE event and monthly meetings are a great demonstrations of all the work being done by chapter members. I highly encourage you to volunteer with our chapter and to help us in our work to serve our local accounting community in 2016! Now is the time to start back to our meetings and make a difference in your local accounting and finance community! We are looking for new speakers for Spring. If you have someone in mind or have a topic you would like us to cover please let me know at IMASavannah@yahoo.com. In addition, I also wanted to encourage new as well as seasoned members, to share their views, experiences, or expertise by submitting articles for our quarterly newsletter. I look forward to hearing from everyone and seeing you all for lunch at future IMA meetings and networking events.

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November Meeting Recap, Market Conditions Review with Martin Financial Group

Our November meeting included a timely presentation on market risk by Tony Martin of Martin Financial Group. Tony reviewed the previous and current interest rate environment and gave some guidance on where he thought the future market might be heading. A big thanks to him from the Savannah IMA!



One of our student members, Kareem Nuru briefs us on his experience at the 2016 IMA Student Leadership Conference



Welcome New Members!

New joins for September:

Gena Carter (Student Membership, Georgia Southern University)

Nancy McGuinness (Young Professional Membership, Paycor)

New joins for October:

Christopher Brown (Student Membership, Georgia Southern University)

Tejah Browne (Student Membership, Georgia Southern University)

Andreina Maldonado (Student Membership, Georgia Southern University)

Kerri-Ann Tingle (Student Membership, Georgia Southern University)

Kaitlyne Ward (Student Membership, Georgia Southern University)

Arnaz Moore (Student Membership, Savannah State University)

Kareem Nuru (Student Membership, Savannah State University)

Thomas Pace (Professional Membership, Thomas & Hutton)

New Joins for January:

Frank Buda (Professional Membership, Georgia Biomass)

Rachael Nolan (Young Professional Membership, Georgia Biomass)

Featured Member Benefit

Career Driver, powered by IMA

A recent tool available to IMA members is Career Driver. The tool has three steps, Assess your Skills, Plan your Path, and See your Future.

The screenshot shows the IMA Career Driver tool interface. At the top, there is the IMA logo and the text 'The Association of Accountants and Financial Professionals in Business'. Below the logo is a navigation menu with options: Home, About IMA, 中国 (China), Europe, Middle East/Africa, and a search bar. The main content area is titled 'CAREER DRIVER' and is divided into three numbered steps:

- 1 ASSESS YOUR SKILLS**
Take the guesswork out of career planning! Evaluate your technical and leadership competencies in management accounting and gain validated feedback on your strengths and areas for improvement.
- 2 PLAN YOUR PATH**
Build a development plan with the help of more than 700 customized self-study courses, webinars, publications, and on-the-job activities to take you to the next level in your career.
- 3 SEE YOUR FUTURE**
Explore your options and match your skills to 40 management accounting roles with your unique development plan as your guide.

Below the steps, there is a testimonial: "CareerDriver helped me envision where I want to be in the next stage of my career and helped me develop a specific plan to get there." The word 'DRIVE' is prominently displayed in a white box on a red background.

In the first step, a member selects the position (eg Budget Analyst) that (s)he currently has or one aspired to (eg Controller). After selecting the position, 28 management accounting skills are listed at the various proficiencies (from limited to expert) and the member proceeds through the evaluation tool and a report is produced comparing the individual's proficiencies to those appropriate to the position.

After the areas for improvement are identified, in step 2 the member next examines a series of recommended IMA self-study courses, publications and research studies, external sources such as books (with Amazon links provided!). In total, 700 different sources for plans are provided.

In the third step, 40 different management accounting positions are compared against the current assessment results. Skills gaps are again revealed and a second plan related to a position can be created.

This Career Driver is a significant benefit for members that is a recent development that we should all take advantage of.

A Glance Back, Taking Steps Forward

Michael Baker
VP of Communications

Looking back at 2015

Another year is now in the rear view mirror. Our chapter has elected new officers, recruited and educated members, and expanded our on line and social media presence. We have had the pleasure of hearing from great speakers and enjoyed good times at our meetings. We have made new friends and strengthened our ties with old ones.

Good job to our chapter for coming together and building a culture that fosters development and fellowship. We have given academic and training scholarships for accounting students and expanded our ties to local and regional universities. It is your work, networking, and attendance that have helped our chapter to finish 2015 strong and prepare for an even better 2016. On a personal level, have you made the commitment to study and prepare to take the CMA exam? This certification not only improves your professional standing, but preparing for it will help you be a better management accountant, and that is a worthy goal for all of us in 2016.

So, keep up the good work, like our Facebook page and share its posts on your network, invite more friends and colleagues to our events and block them out on your business and social calendar. Please see below for our upcoming events for the first quarter of 2016. We are always looking for speakers and topics to discuss with our chapter. Have a topic that you would like to hear or speak about? Let us know. Another way we have to stay in touch is with our quarterly newsletter. This is published roughly 4 times a year and contains information about chapter, regional, and national IMA happenings. If you would like to write an article for inclusion in the newsletter, drop us a note.

You can always reach us at www.savannah.imanet.org. Feel free to pass this letter along to business colleagues, especially other financial professionals who would benefit from an IMA membership.

We have also brought our chapter firmly into the social media scene with the development of our Facebook Page (www.facebook.com/IMASavannah). We try to post new items of interest to accounting, Savannah, and business here at least once a day to keep the content fresh. If you have something you would like us to share on the page, send it over and we'll get it shared. This is also a page you can share to various Facebook business networking groups.

As we move forward into 2016, let's keep our conversation going and growing!

Meet your Chapter Officers!

Need something from your chapter? Here is a list of your officers. They are here to serve you!

Adrian Jay Savannah Chapter - President
Kelly Puetz Savannah Chapter - VP of Professional Education
Michael Baker Savannah Chapter - VP of Communication
Christina Graves Savannah Chapter - Secretary
Lynn Clark Savannah Chapter - Treasurer

Tim Cairney Savannah Chapter - VP of Membership
Tim Cairney Savannah Chapter - Regional Council Delegate, Regional President
Stephen Clarke Savannah Chapter - Director
Nancy McGinnis Savannah Chapter – Director

Upcoming Local Events

February Meeting!

Our first meeting of 2016 is on Thursday, February 18.
Below, please find the announcement and the registration URL.

Subject: IMA Lunch Meeting
Date: Thursday, February 18
Location: Savannah Coffee Roasters
- Veteran Owned, Veteran Made -
215 W Liberty Street
Savannah, GA 31401
Time: 11:45 am to 1:00pm (arrive early to say hello!)
Cost: \$20, \$15 Student
Payment: Please go to the following website for payment and for food selection:
<http://savannahcoffee.com/ima-lunch-and-learn/>
Presenter: Mr. Steven Miller, CPA of Webster Rogers LLP (please find bio below)
Summary of Experience

Steve Miller is a Partner in the Firm's tax group. Steve has over thirty years of public accounting experience with an emphasis in taxation. Prior to joining WebsterRogers in 2013 he was a partner with a regional public accounting firm in Hilton Head, SC. Corporations, individuals and not-for-profit organizations look to Steve to provide skilled tax planning and compliance services. Steve has extensive experience working with closely-held businesses and their owners, serving clients across a wide range of industries, including retail, professional services, manufacturing,

distribution, real estate, construction, technology and entertainment sectors. He also has experience working with individuals in the area of tax and estate planning.

Professional Affiliations

- Licensed Certified Public Accountant in the States of South Carolina and North Carolina
- Member of the American Institute of Certified Public Accountants
- Member of SCACPA
- Member of the Hilton Head Council of Estate and Financial Advisors

Community Involvement

- Rotary Club of Bluffton – President elect 2013-2014
- Bluffton Public Development Corporation – Board Member

Education

- Appalachian State University – BSBA with a concentration in accounting

He will speak on tax developments that occurred in 2015, such as:

- The "Protecting Americans from Tax Hikes" Act (PATH)
- Section 179
- Bonus Depreciation
- Research & Experimentation Credit

Let's have a great beginning of year attendance for this great speaker and presentation!

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Upcoming Regional Events

Atlanta Chapter

1/28/2016, Thursday

Lunch 11:45A-1:00 P

Federal Tax Update

Tom Jollay & Torie Barrie, CPA

Partners, Bennett Thrasher

<http://www.imaatlanta.org/>

Charlotte Chapter

2/5/2016, Friday

12:00P – 4:30P

IMA CAROLINAS COUNCIL ANNUAL WINTER CONFERENCE

Johnson and Wales University

<http://www.ima-charlotte.org/events>

South Florida Chapter.

Fort Lauderdale, FL

2/19/2016, Friday

8am-5pm.

MrExcel at Nova Southeastern University

- expert spreadsheet training.

<https://www.eventbrite.com/e/bill-mrexcel-jelen-at-ima-8-cpe-seminar-tickets-19901496913>.

(hotel at Marriott (954) 475-1100 , and mention that you will be attending an event at Nova Southeastern University to get \$129 group rate)

Upcoming National Event

Fast Forward, IMA's Annual Conference and Expo ACE16. Join IMA's Annual Conference & Expo in Las Vegas!

Accelerate your learning with a program of more than 50 educational sessions covering a variety of topics including cybersecurity, ethics, revenue recognition changes, leadership, risk management, and more.

Why Attend?

50+ SESSIONS, 30+ NASBA-APPROVED CPE CREDITS, 15+NETWORKING EVENTS

Gain expert insight from industry-leading speakers. Experience leading-edge content and dynamic discussions. Increase your network by 800+ accounting and finance professionals.

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Networking Opportunities!!!

Want to see what is going on in related organizations around Savannah and around the region?

Local Savannah

- IIA Institute of Internal Auditors coastal Georgia Chapter
 - IIA - Auditing the Business Continuity Plan (<https://chapters.theiia.org/coastal-georgia/Events/Pages/Auditing-the-Continuity-Plan.aspx>)
- Society of Human Resources Management Savannah Chapter
 - SHRM: (<http://savannah.shrm.org/events/2015/10/october-tsac-chapter-meeting>)
- Association of Certified Fraud Examiners
 - ACFE: (<http://nf.acfe.com/eweb/DynamicPage.aspx?Site=ACFEWEB&WebCode=ChpEvtList>)
- Georgia Society of Certified Public Accountants Savannah Chapter
 - GSCPA: (<http://www.gscpa.org/content/Membership/Chapters/Savannah.aspx>)
- Savannah CFO Council
 - <http://www.cfocouncil.com/>

Regional Other IMA Chapters

- IMA- Atlanta (<http://www.imaatlanta.org/>)
- IMA - Charlotte (<http://www.ima-charlotte.org/events>)
- IMA - Columbia (<http://colaima.imanet.org/>)
- IMA – Jacksonville (<http://www.jacksonvilleima.org/>)