



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*

It's hard to believe we are already approaching year end and budget season is upon us. We ended last year with one of my all-time favorite speakers and now author Roy Austin. Roy's presentation was based on his book "Alligator Business Solution" which is scheduled to come out by the end of the year. Roy gave us all a lot to reflect on, while providing a sound message with fresh insight that appealed to everyone. Roy is an avid Savannah IMA member and past IMA President. If you have not gotten a chance to meet him, I encourage you to make a point to meet him at our next meeting in October. In August we kicked off our new year with Tracy Foster from Robert Half. Tracy delivered a very powerful presentation on GEN Z last month.

During the summer we had volunteers do a lot of organizing for the upcoming year. There is one volunteer in particular who I owe a great amount of thanks to Tim Cairney. We are extremely grateful to have him in our organization. He has devoted a lot of time and personal resources to our chapter in the last year, and it is because of his dedication that we are a successful chapter today. Tim has distinguished himself as a person with dedication, integrity, and professionalism. On behalf of all of us, I just wanted to thank Tim for his service and outstanding contributions to the Savannah IMA and Accounting Profession. We are currently in the process of 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. 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.

I hope to see you all at our next meeting which is scheduled for Thursday, October 22, at 12PM at Savannah Coffee Roasters, 215 W Liberty St, Savannah, GA 31401 (912) 352-2994



## Great Times with Wells Fargo

Our most recent lunch meeting involved a presentation on fraud prevention issues by Wells Fargo Treasury Management Associate Emily Dixon. Highlights of her talk included a discussion of electronic imposter fraud, check fraud and ACH fraud countering them with positive pay, cyber fraud, and best practices to avoid all of these types of fraud. While the talk was given by Wells Fargo, most banks can provide you with security to help avoid fraud issues. Lunch was provided by Savannah Coffee Roasters and was excellent as usual. Below is a picture from our fraud prevention lunch and learn.



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## Fund Raising for Susan G. Komen

Sarah Westberry shared with us the current fund raising initiative for the Susan G. Komen Coastal Georgia chapter. She is working to raise \$2,000 as her personal goal to help support this worthy cause.

Since Komen Coastal Georgia's inception in 2006, we have invested over \$2 million in local community programs and over \$700,000 into cutting-edge breast cancer research. In the last five years, Komen Coastal Georgia has funded 7,053 screening services, 1,375 diagnostic services, resulting in the detection of 126 treatable Breast Cancers!

Furthermore, the Affiliate has collaborated with community partners to develop and fund targeted outreach and navigation programs to reach under-served populations and has invested in research that has reduced the death rate for breast cancer by 30 percent in the last 25 years.

Sarah appreciates any support that you can provide. You can view her website and make donations here:  
<http://coastalgeorgia.info-komen.org/goto/bigwigSarah>

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**Lynn Clark Represents Savannah IMA at Recent Regional Meeting**

As can be seen by the pictures below, Lynn Clark represented us well at the recent IMA regional meeting. She will provide a full report in the next newsletter.





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## It's All About Communication

*Michael Baker  
VP of Communications*

One of the most exciting initiatives of our new officers with the relaunch of our chapter is the emphasis on networking and communication. From email, to Linked In, to updating our website, to launching an IMA Savannah Facebook Page, we are working on developing and broadening our communication and networking channels. We want to help professionals meet and develop their relationships and professional skills.

So how do we improve our communications within the chapter? There are many ways to “stay in touch” and with so many options, everyone is sure to find at least one that they are comfortable with. Some are face to face, many are electronic, but all have the same goal. Keeping members in the know as to when we are meeting and what we are discussing. As well as what is going on around the region.

The most interactive communication time we have is our monthly chapter meetings. Recently these have been at the Savannah Coffee Roasters and they have provided a good lunch in a relaxed atmosphere. We are always looking for speakers (Including You!) and want to know what topics that you would like to hear about.

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, just let us know. You can always reach us at [www.savannah.imanet.org](http://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 recently started a discussion group on LinkedIn called “IMA Savannah Georgia”. Hopefully this can become a place to have discussions on the state of the chapter, the profession, and the regional economy. Feel free to ask questions and share ideas, everyone is waiting to hear from you.

We have also brought our chapter firmly into the social media scene with the development of our Facebook Page ([www.facebook.com/IMASavannah](http://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.

So let's talk, and see what our conversation can develop.

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## Meet your New Chapter Officers!

With the New Year has come some new officers. Please join us in welcoming them.

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

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## Upcoming Local Events

### October IMA Savannah Meeting

October 22, 2015

Savannah Coffee Roasters, 215 W Liberty St, Savannah, GA 31401 (912) 352-2994

Topic: Social Security Retirement Benefits

Presenter: Sam Crossly, Massachusetts Mutual Life Insurance Company

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Sam Crossley grew up in Savannah, GA and has been a financial professional with Massachusetts Mutual Life Insurance Company since 2001.

### Savannah Hump Day (With the Savannah CFO Council)

Where: Funky Brunch Cafe, 304 East Broughton St

When: Wednesday, October 14 (every 2nd Wed)

Time: 5:15 to 7 PM

Food & Drink: Cash bar, menu

RSVP: Roy Austin, rockwell@hargray.com

## Upcoming Regional Events

IMA Student Leadership Conference

\*\*\*\*This year in Florida - November 2015 See Below

## Upcoming National Events

### Registration Now Open for IMA's 16th Annual Student Leadership Conference

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IMA®'s (Institute of Management Accountants), most anticipated event for accounting and finance students and academics is now open for registration. The 16th Annual Student Leadership Conference, to be held on November 12-14, 2015, at Disney's Coronado Springs Resort in Lake Buena Vista, FL, offers students the opportunity to explore new directions for their careers. For more details, visit [www.imaslc.org](http://www.imaslc.org).

For three days, attendees will be inspired by speakers, create new relationships, and connect with industry leaders in a dynamic, friendly environment. Through educational and

insightful presentations, students will be offered the opportunity to learn more about the value of the CMA® (Certified Management Accountant) certification, networking strategies, and leadership development.

Keynote presentations for this year's conference include:

- "Passionate People Drive Magical Experiences," by Clark Jones, vice president of finance, global marketing, sales, travel operations, technology and public affairs at Walt Disney Parks & Resorts

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- "Why Do Ordinary People Commit Extraordinary Financial Crimes?" by Kelly Richmond Pope, Ph.D., CPA, associate professor of accounting at DePaul University

- "Zebras and Cheetahs," by Colby Jubenville, Ph.D., author, speaker, professor, entrepreneur, inventor, and fundraiser

"The Student Leadership Conference provides a unique experience and allows students and faculty the opportunity to connect with top

business leaders and like-minded peers from across the country," said Jodi Ryan, IMA director of Student/Academic Relations. "This year, with the added fun of our magical location, we're certain the experience will be both educational and exciting."

For more information and to view a full conference program, please visit [www.imasl.org](http://www.imasl.org). Join the conversation for this year's event on Twitter at #IMA15SLC.

### ACCA and IMA explore future challenges facing the accounting profession

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Signature research agenda launches with new website and SoMoClo report

The Future Today website, housing joint research from ACCA and IMA, along with blogs, guest commentary, and other interactive features.

New York and Montvale, N.J., September 15, 2015 –ACCA (the Association of Chartered Certified Accountants) and IMA® (Institute of Management Accountants) explore the future of the accounting profession with the launch of a new multi-year signature research initiative focusing on the future of the accounting and finance profession.

"Through this new platform we aim to inform, educate, and raise the debate about the future world of finance, business, and accountancy," said Helen Brand OBE, ACCA Chief Executive.

The initiative launched today with a new joint website, The Future Today, [www.futuretoday.com](http://www.futuretoday.com), and the first ACCA/IMA signature research report, SoMoClo (Social, Mobile, and Cloud).

The new website aims to engage senior leaders in business and finance, as well as academics and political decision-makers. The [futuretoday.com](http://futuretoday.com) is about taking a wide view of the issues that matter for the profession, and for global business and society in the broader sense.

Announced last November, the ACCA/IMA signature research initiative is intended to serve accounting and finance professionals by providing insights on what the future means for the global profession. The work is anchored by

"Ultimately, this new initiative is about serving the public interest and enhancing the capability of CFOs and their teams everywhere. The accounting profession has a responsibility to create and nurture stronger and more ethical organizations, and we at IMA and ACCA are

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happy to be part of this charge with a unique focus on future challenges and opportunities,” said Jeff Thomson, CMA, CAE, IMA President and CEO.

### SoMoClo

As featured on The Future Today website, ACCA and IMA’s first new signature research report, SoMoClo, offers predictive insights about the effects of social, mobile, and cloud technologies. It covers the views of more than a dozen senior finance leaders from global organizations such as Deutsche Bank, Deloitte, Intuit and Microsoft.

“While these converging technologies can unleash business possibilities, people—not technology—will be central to the process. As a result, finance professionals will change and evolve,” Brand said.

The report notes that while social, mobile, and cloud technologies may be embraced by marketing and human resources teams, in comparison, the finance function may be behind the curve in terms of adoption. But, perhaps this caution comes with a keen eye for risk management, which is a key competency of finance professionals.

“CFOs and their teams have the opportunity and the obligation to ensure that the organization both understands the transformational nature of information technology on the value chain, and, the risks such as information security including cyber-breaches from broader data access,” added Thomson.

Accounting and finance leaders can learn more about SoMoClo and access additional research from ACCA and IMA at [www.futuretoday.com](http://www.futuretoday.com).

### 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/>)