



NC TRIANGLE AREA CHAPTER # 406  
PROGRAM BOOKLET

2007 - 2008

[WWW.IMANCTRIANGLE.ORG](http://WWW.IMANCTRIANGLE.ORG)

North Carolina Triangle Area Chapter 406  
Institute of Management Accountants

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PRESIDENT'S WELCOME

On behalf of the NC Triangle Board of Directors and myself, I would like to thank you for your continuing support. I want to welcome all of the new members to our chapter and I would like to thank established members for the confidence shown by electing me President. I am proud to say we are one of the largest IMA chapters in both number of members and geographical area covered. Our members represent a variety of careers and organizations. With 500+ members, we provide excellent opportunities for our members in terms of professional networking. Our members have the ability to meet, socialize, learn about today's hot topics through Dinner meetings, CPE seminars, and Carolina Council meetings. Our goal is to provide you with information on our chapter, the membership, and the benefits of the organization.

The Certified Management Accountant (CMA) designation provides corporate management and individual members with an objective measure of knowledge and competence in the field of management accounting. The CMA is an invaluable credential for professional advancement and for broadening professional skills and perspective. Our chapter partners with various education providers to help members successfully pass the necessary examination. Our most recent cooperation with Duke University Continuing Studies offers a nine-month instructor-led course to prepare candidates to sit for the CMA exam. For more information on CMA Learning System, visit [www.learnmore.duke.edu/cma](http://www.learnmore.duke.edu/cma). Our chapter has entered into a partnership with Gleim to ensure your success on the CMA/CFM exams. Because of your membership in the North Carolina Triangle Area Chapter, you are eligible for significant discounts on any of Gleim's CMA/CFM materials.

Our dinner meetings are held the third Thursday of each month. These meetings provide a great opportunity for networking and socializing, topped off by an excellent speaker on a current topic of interest. We are meeting at the North Raleigh Hilton again this year. Come out and join us!

Feel free to call me or any other board member with questions or suggestions regarding the Chapter. Please enjoy the roster and I hope to see each and everyone soon.

Jamie

Respectfully yours,  
Jamie Long  
IMA Chapter #406 President

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CHAPTER EDUCATIONAL PROGRAMS SCHEDULE

Our dinner meetings are held the third Thursday of each month. Generally, they start with a social period at 6:00 PM, dinner at 6:30 PM and business meeting at 7:00 pm. The speaker follows from 7:15 PM to 8:15 PM. We don't have all the speakers and subjects confirmed, so please check our newsletter, website (<http://www.imanctriangle.org>), or email David Roth at [David@RothResourcesInc.com](mailto:David@RothResourcesInc.com) to put yourself on a fax or email list for updates to the monthly dinner meetings.

We have designated certain nights for special recognition of members or Board activities as follows:

| <b>Date</b>  | <b>Topic</b>  | <b>Speaker</b>   |
|--|---|--|
| 09/20/2007   | <b>ERP Systems</b>  | Lisa Dion  |
| 10/18/2007   | <b>Tax Update</b>   | Steve Cornwell, RTI  |
| 11/14/07<br>8:00 am to<br>5:00 pm<br>8 hrs.<br>CPE | <p><b>NC Triangle &amp; Carolinas Council<br/>Joint Educational Opportunity</b></p> <ol style="list-style-type: none"> <li>1. <b><u>Anatomy of a Plan-Better Practices for Management Accountants</u></b></li> <li>2. <b><u>From Sox to ERM and Beyond</u></b></li> <li>3. <b><u>Strategic Cost Management: A Global Perspective</u></b></li> </ol> | <p><b><u>Jeffrey C. Thomson</u></b></p> <p><b>Vice President of Research and Applications Development at the Institute of Management Accountants (IMA)</b></p> |
| 11/15/07   | Identity Theft<br><br>Toys for Tots   | Caroline Farmer  |
| 01/17/2008   | <b>Economic Forecast – 2008</b>   | State Treasurer's Office   |
| 02/21/2008   | Career Planning<br>Student Night  | Patti Gillenwater  |
| 03/20/2008   | Exchange Traded Funds<br>CMA/CFM Night  | Tommy Sikes  |
| 04/17/2008   | Outsourcing Manufacturing   | Shen Isgar   |
| 05/15/2008   | Pension Planning - How Much is Enough?<br>Past Presidents' Night  | Charles Meoehrke   |

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**Dinner Registration Information**

6:00 PM Registration & Social  
6:30 PM Dinner  
7:15 PM Speaker  
9:00 Networking ends and Board meeting begins

Please register on line at our chapter website <http://www.imanctriangle.org/registration/register.htm>  
Directions to North Raleigh Hilton:

- From Raleigh using I-440 take the Wake Forest Road exit #10. If you are heading north toward Wake Forest you will turn left at the end of the exit and it will be about ¼ mile on your left. If you are heading south towards Cary, you will take a right at the end of the exit and it will be about ¼ mile on the left. Either way, you are going away from down town Raleigh.
- From RTP, Durham, Chapel Hill area, take 40 East to 540 North, take the Falls of the Neuse Road exit # 14. Turn right onto falls of the Neuse Road becomes Wake Forest Road. Stay on this road for about 5.5 miles and the Hilton will be on your right.

The buffet dinner meeting cost is \$30 for Chapter IMA members, \$35 for non-IMA members, NC State students Chapter members are \$15. These prices are subject to change. The dinner meeting is a one hour CPE event.

We plan to offer several Pre-Dinner CPE Offerings prior to our regularly scheduled dinner meetings.

Other CPE Offerings

| Date       | Topic  | Speaker  |
|------------|--|--|
| 10/10/2007 | <p style="text-align: center;"><a href="http://www.TheConvergenceSeminar.com">The Convergence Seminar™</a><br/><a href="http://www.TheConvergenceSeminar.com">http://www.TheConvergenceSeminar.com</a></p> <p>Code for IMA registration: IMA</p> | <p style="text-align: center;"><i>Bruce Pounder, MBA, CMA, CFM</i></p> |

CAROLINAS COUNCIL

The Carolinas Council (<http://www.imacarolinascouncil.org>) generally offers additional CPE credits each quarter in locations throughout the Carolinas. The Fall Council Meeting is October 26-27, 2007 in Florence, SC followed by the Winter Meeting in February 2008. The Spring Conference is at Ocean Creek Resort, N. Myrtle Beach, SC from April 25 - 26, 2008.

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Board of Directors for 2007-2008

| Office  | Name                                  | Phone #                      | Email  |
|---|---------------------------------------|------------------------------|--|
| President   | Jamie Long                            | 919-781-0400<br>ext 116      | <a href="mailto:jlong@mriraleigh.com">jlong@mriraleigh.com</a>   |
| NC State Student Chapter<br>Carolina Council Delegate | Mina Kye<br>Kathy Santos-<br>Rezendes | 919-830-7465<br>919-740-5289 | <a href="mailto:springfever456@hotmail.com">springfever456@hotmail.com</a><br><a href="mailto:Rezendes@bellsouth.net">Rezendes@bellsouth.net</a> |
| VP Administration                                     | Bob Boone                             | 919-571-7828                 | <a href="mailto:Rdboone2000@yahoo.com">Rdboone2000@yahoo.com</a>   |
| Treasurer   | Teresa Kazaglis                       | 919-342-4835                 | <a href="mailto:tkazaglis@nc.rr.com">tkazaglis@nc.rr.com</a>   |
| Secretary   | Dan Benvie                            | 919-541-7207                 | <a href="mailto:dbenvie@rti.org">dbenvie@rti.org</a>   |
| Director Employment                                   | Chris McKittrick                      | 919-845-9127                 | <a href="mailto:Ctm1999@hotmail.com">Ctm1999@hotmail.com</a>   |
| Dir. Member Attendance                                | Steve Drago                           | 919-678-<br>0900x125         | <a href="mailto:sdrago@ultimius.com">sdrago@ultimius.com</a>   |
| Co-Dir. Fund Raising                                  | Open                                  |                              |  |
| VP Membership   | Vance Josey                           | 919-435-5517                 | <a href="mailto:vjosey@nc.rr.com">vjosey@nc.rr.com</a>   |
| Dir. Member Acquisition                               | Chris Johnson                         | 919-773-5189                 | <a href="mailto:chris.johnson@pergo.com">chris.johnson@pergo.com</a>   |
| Director Retention                                    | Tom Welsh                             | 919-598-5017                 | <a href="mailto:tomgwelsh@hotmail.com">tomgwelsh@hotmail.com</a>   |
| Dir. Special Activities                               |                                       |                              |  |
| VP Education  | Ron Lowell                            | 919-604-3575                 | <a href="mailto:rlowell@nc.rr.com">rlowell@nc.rr.com</a>   |
| Dir. CMA/CFM Program                                  | Scott Stafford                        | 919-431-1140                 | <a href="mailto:scotskippy@hotmail.com">scotskippy@hotmail.com</a>   |
| Dir. Seminars   | Lowell Miller                         | 919-833-6838                 | <a href="mailto:lmiller@nclifega.org">lmiller@nclifega.org</a>   |
| Co-Dir. Student Activities                            | Christina Cook                        |                              | <a href="mailto:wchrisy@hotmail.com">wchrisy@hotmail.com</a>   |
| Co-Dir. Student Activities                            | Scott Truax                           | 919- 816-0807                | <a href="mailto:jstruax@access4less.net">jstruax@access4less.net</a>   |
| Dir. Program Registration                             | Ann Wortham                           | 919-992-8445                 | <a href="mailto:annellis@nortel.com">annellis@nortel.com</a>   |
| Dir. A/V Equipment                                    | Jim Russell                           | 919-550-1773                 | <a href="mailto:russelljrr@aol.com">russelljrr@aol.com</a>   |
| VP Communications                                     | David Roth                            | 919-961-6084                 | <a href="mailto:David@RothResourcesInc.com">David@RothResourcesInc.com</a>   |
| Director Newsletter                                   | Kimberly Langley                      | 919-541-6642                 | <a href="mailto:klangley@rti.org">klangley@rti.org</a>   |
| Director Public Relations                             | Nancy Smith                           | 919-378-6509                 | <a href="mailto:Nancy.E.Smith@verizonbusiness.com">Nancy.E.Smith@verizonbusiness.com</a>   |
| Director Website & Roster                             | Kathy Santos-<br>Rezendes             | 919-740-5289                 | <a href="mailto:Rezendes@bellsouth.net">Rezendes@bellsouth.net</a>   |
| Director Community Service                            | Ted Bachman                           | 919-606-3477                 | <a href="mailto:tedbachman@mindspring.com">tedbachman@mindspring.com</a>   |

## WHO WE ARE

### VISION STATEMENT

"Global Leadership in education, certification, and practice of management accounting, finance and information management."

### STATEMENT OF MISSION

Provide to members personal and professional development opportunities through education, association with business professionals, and certification in management accounting and financial management skills. Ensure that IMA is universally recognized by the financial community as a respected institution influencing the concepts and ethical practices of accounting, financial and information management skills.

### SERVICES

Among the services available from which a member can benefit from are:

- Leadership Training - Volunteer service at the chapter or national level gives you valuable leadership experience. Volunteer leaders begin their service at the chapter board level, and may elect to regional council service, national committee service, and national board service
- Employment Networking - IMA serves as a clearing house for members interested in either placing an "open position available" or "position wanted" notice in a local chapter or council newsletter, or in the career center on the IMA website
- The IMA Professional Development-Lifelong Learning Center gives Management Accountants and Financial Professionals lifelong learning and "employability" from hire to retire.

Members have access to a portfolio of products and services to meet their educational needs in both technical and personal development skills. Educational services have been developed with member convenience in mind and are offered in all mediums and are available at any time, in any place and at a range of prices. Training is delivered in multiple ways, including online, self-study, in house/on site, conferences and seminars. In addition, a large selection of professional publications are available for purchase.

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SERVICES cont'd

Participation in any IMA training is approved CPE credit for those members who are certified:

- McLeod Information Center - Members have access to one of the largest and most comprehensive collections in the ;management accounting and financial management fields.
- Ethics Counseling Service - A counselor will assist members in applying the IMA Standards of Ethical Conduct for Management Accountants and Financial Professionals to specific problems. Members using this hotline service are guaranteed confidentiality
- Certified Management Accountant (CMA) Program - The CMA Program requires the candidate to pass a rigorous four part examination and meet specific educational and professional competence in the field of management accounting.
- Certified in Financial Management (CFM) Program - The CFM will confirm your proficiency in financial management and your dedication to personal and professional growth. As the body of knowledge of the CFM examination is complementary with that of the CMA examination, three of the examination parts (Parts 1, 3, and 4) will be the same for both programs. Part 2 of the CFM examination will be devoted to in-depth testing of corporate financial management topics. The examinations for the CFM designation will not be offered after December 2007.
- Read Strategic Finance magazine for the latest trends and techniques in our field and Management Accounting Quarterly for the latest research. Both publications are included as benefits of your IMA membership. Visit the Strategic Finance website (<http://www.strategicfinancemag.com>) for the reviews on software available in the industry.
- Membership Interest Groups (MIGs) - The Controllers Council, Cost Management Group and Small-Business Council each provide a tailored monthly newsletter, a separate e-mail exchange for networking and sharing information, and access to the MIGs online directory, which allows members to locate colleagues by industry, location, and special projects. Members participate in surveys on a wide range of relevant, topical issues, with results reported in the newsletters and other media.
- Industry Sectors/E-Mail Exchanges - Accessible to members via the Internet at no cost, Industry Sectors offer a variety of ways to reach out to other members in your industry. Once you join an Industry Sections, you can sign up for its e-mail exchange, which enables you to ask questions of hundreds of other members by simply sending an e-mail to the group address. Discussions over topics from software development to accounting policies to career issues and more. There are Industry Sectors for the

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SERVICES cont'd

- following industries: Academic, Communications/Telecommunications, Construction, Government, Health Care, Manufacturing, Natural Resources, Not-for-Profit, Services, Technology, Transportation, Wholesale/Retail, and Utilities.
- Open e-mail Exchanges - In addition to the e-mail exchanges related to specific industries, you can join IMA e-mail Exchanges dealing with other special interests. These include: Certification Candidates, Financial Management, Family Business, and International Business.
- Membership Discount Programs - IMA offers saving to members on a wide variety of services and products including car rental, insurance, office resources, and financial services.
- IMA Online Marketplace - Do your shopping online at a discount. All IMA members receive discounts on the products and services for their home or workplace that are offered through the IMA Online Marketplace at [www.imanet.org](http://www.imanet.org).

BENEFITS

As an IMA member, you will not only take advantage of the prestige that comes from membership in the world's largest association of business financial executives, you will also:

- Receive, every month, the IMA's innovative magazine, Strategic Finance
- Receive the IMA's new journal, Management Accounting Quarterly
- Qualify to join financial executives around the world as a candidate for one of IMA's professional certifications, the CMA (Certified Management Accountant) or CFM (Certified in Financial Management)
- Have access to the members-only areas of the IMA Web site, [www.imanet.org](http://www.imanet.org), featuring the IMA career site and Job Bank, the IMA Member Interest Groups, and access to the IMA member discount programs, featuring personal and business discounts on:
  - Discounted Shipping Services: UPS, Airbone
  - Banking & Finance: MBNA credit cards 1-800-847-7378 Consumer Finance Loans (Gold Reserve & Gold Option) 1-800-892-8349, Investor Services (CD & Money Market) 1-800-345-0397
  - Auto Rentals: Hertz 1-800-654-3131 Reference # CDP60241 and Alamo 1-800-354-2322 Reference # BY165532
  - Office & Home Products: Penny-wise office products and Framing Success

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BENEFITS cont'd

- IMA's insurance plans: Group Term Life; Automobile & Homeowners; Small Business; High-limit Accident; In-hospital; Disability; Long Term Care; Excess Major Medical; Medicare Supplement; and Cancer Expense
- Be able to access IMA's Online Marketplace, featuring member discounts on a wide variety of personal and business products and services offered by the leading .com retailers
- Qualify for member discounts on all IMA conferences and seminars, held nationally and regionally
- Qualify for free on-line professional education courses
- Be able to join one of the IMA's Member Interest Groups— Controllers Council, Cost Management Group, the Small-Business Council, and the Sarbanes-Oxley (SOX) Group, the newest MIG.
- Be able to participate, at no extra cost, in one of IMA's 13 Industry Sector groups and 6 topic groups, in which you will be able to network with your peers who are working in the same industry as you are
- Be able to access the latest research in the financial management field, through the IMA's respected Foundation for Applied Research, or through the McLeod Information Center, the largest resource of its kind
- Qualify for membership in one of IMA's nearly 300 local chapters, a great source for networking, new ideas, and information about business trends nationally and locally
- Take advantage of IMA's exclusive relationship with Robert Half International, our National Career Partner and the largest financial search firm and career resource in the world

To learn more about IMA benefits and services, and for information on contracting the IMA and its departments directly, please visit the IMA website at [www.imanet.org](http://www.imanet.org).

## MEMBERSHIP

Members in IMA range from management accountants and financial management professionals just beginning their careers to presidents and CFOs of major corporations. Membership also includes Certified Public Accountants, educators, students, and many involved with federal, state, and local governments.

### YOUR OBLIGATION AS A MEMBER

1. Attend every chapter meeting if at all possible. If you can not attend the dinner, attend the technical session.
2. Become better acquainted with your fellow members, exchange ideas and discuss mutual problems.
3. Develop interest in the executives of your company in the chapter and bring them to the chapter meetings and other affairs.
4. Funds are paid to the Chapter by the National Headquarters based upon membership growth, certified professional education credits and certification levels within the chapter. While we have the means to track membership growth and certification levels, we need your help in ensuring that your CPE hours are correctly credited back to us as a chapter for the maximum return of your annual dues back to us. Please use either the local or national website and record all CPE, whether put on by us, your employer or another CPE registered provider. The most important single source of competition points is member attendance. Attend the meetings, enjoy the speakers and help the chapter in competition.
5. Submit names of prospective members to the Vice-President, or Membership Director to help the chapter grow.

### HOW TO JOIN THE IMA

We invite you to review the criteria for membership, and to learn more about the IMA by browsing our website and checking out the introduction to the IMA and reasons you should consider joining us. When you're ready, complete the membership application to join. It's a step to greater professional fulfillment and advancement.

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ADMISSION CRITERIA FOR MEMBERSHIP

(a) Membership in the Institute shall be open to all persons who are interested in the goals and objectives of the Institute, and who are willing to subscribe to the Bylaws of the IMA.

(b) All persons residing within the United States, its possessions, or Canada, and who are otherwise qualified for membership under the Bylaws, are eligible for membership as Regular Members, Associate Members or Student Members and all persons residing outside the United States who are otherwise qualified for membership under the Bylaws are eligible for membership as Regular International Members-at-Large as defined in Article II, Section 2 of the Bylaws.

NOTE: Prior felony conviction - Your application, with a brief explanation of circumstances, should be sent directly to the Executive Director of IMA, 10 Paragon Drive, Montvale, NJ 07645, in an envelope marked "Confidential."

STUDENT MEMBERSHIP

If you are a prospective student member, we invite you to visit our student site at [www.ncsu.edu/stud\\_orgs/ima](http://www.ncsu.edu/stud_orgs/ima) and review the Student Information Kit. To join, please fill out our student membership application.

GUESTS

Members are privileged to invite guests to our chapter meetings and discussion forums. We believe that these guests will enjoy our programs and find something of value in them.

We are very interested in active members, rather than a large membership. We invite guests to apply for membership if they can benefit from the services of the IMA with the understanding that such benefits are usually in direct proportion to the participation in the various chapter activities.

## CPE REQUIREMENTS

What is the CPE requirement for CMAs/CFMs?

- CMAs/CFMs - 30 CPE credits each calendar year to keep their certification

When does my CPE requirement start?

- Members who have successfully completed CMA/CFM exam - the calendar year following completion (for example, if you were notified June 1999, the CPE requirement began Jan 1, 2000).

How do I report my CPE credits?

Credits earned at national IMA seminars are automatically reported on your billing statement. You are required to check "I am in compliance" or "I am not in compliance" on the IMA dues billing statement. It is printed in red on the top right-hand side of the document. Please note that you are reporting for the previous calendar year, i.e., 1999 CPE is reported on your 2000 billing statement.

Outside providers are not included in this reporting. The documentation does not have to be submitted, but it does need to be reported to national or to your local chapter ([www.imanctriangle.org/record\\_cpe.htm](http://www.imanctriangle.org/record_cpe.htm)) for proper credit to your chapter. It should also be retained by the member as IMA randomly verifies this information.

How does IMA verify my credits from outside providers?

If you are selected by IMA for verification of your credits, you will then be asked to submit proper documentation, i.e., certificate, attendance roster, etc. Records should be kept for 5 years.

I have completed more than my required credits. Can any credits be carried forward to next year?

When a certified member (CMA/CFM) completes more than 30 credits in a given year, up to 10 credits may be carried forward to the next year (i.e., if 38 credits are completed, 8 may be carried forward; if 45 credits are completed, only 10 credits may be carried forward).

What is the policy for delinquency in reporting required CPE credits?

Certification status becomes inactive when a CMA/CFM fails to complete 30 CPE credits in a year. To return to good standing, the CMA/CFM must complete 60 CPE credits by the end of

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CPE Requirements cont'd

the next calendar year (i.e., 30 credits for the current year plus any shortfalls from the previous year). For instance, if a CMA/CFM completed 20 credits in 1998 and reported 40 credits in 1999, the status will be returned to good standing.

If the 60 credits were not accomplished in the two-year period, the only way to return to good standing is to complete 60 credits in the next calendar year.

Do I get CPE credit for the CMA/CFM examinations?

You earn 12 hours of CPE for each part of the CMA/CFM certification exam that you pass. CMAs earn 12 CPE hours for passing Part 2 of the CFM exam and CFMs earn 12 hours of CPE for passing Part 2 of the CMA exam. CMA/CFM exam CPE credits will be posted to your account on a monthly basis.

What topics and programs are acceptable for CPE credit?

The topics should be related to those covered on the CMA/CFM examination and/or your job responsibilities.

For example, all aspects of accounting, business applications of mathematics and statistics, computer science, economics, finance, management, production, marketing, business law, and behavioral science.

Programs may be regular college courses, seminars, workshops or technical meetings under the direction of a speaker, instructor or discussion leaders.

CPE Measurement Guidelines

- College courses - 15 CPE per semester credit hour, 10 CPE per quarter credit hour
- Short courses/seminars - 1 CPE per 50 minutes of session time.
- A full day program with at least 7 hours of session time (not including lunch and breaks) equals 8 CPE credits.
- Speaker/discussion leader in a program or seminar offered by business, professional associations, and college/university professional education centers - CPEs equal 2x the number of presentation hours.
- College teacher - CE credit equal to the course credit hours x the number of weeks (only the first time course is taught). CPE credit may be requested only once in any three-year period unless the material or textbook used has changed substantially.

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Other qualified Ways to Earn CPE Credit

- Accounting periodicals, computer software programs, examinations, and self-study programs will receive the credit hours recommended by sponsoring organizations.
- Technical materials submitted for publication are eligible for CPE.
- Published articles containing technical accounting and financial management material can earn a maximum of six hours each.
- Books and monographs can earn a maximum of 20 hours each. If an item was submitted for publication but was not accepted, it would earn one half the credits it would have earned if published. IMA will assign specific hours upon receipt of a copy of the publication.

## ETHICAL STANDARDS

### ETHICAL BEHAVIOR FOR PRACTITIONERS OF MANAGEMENT ACCOUNTING AND FINANCIAL MANAGEMENT

In today's modern world of business, individuals in management accounting and financial management constantly face ethical dilemmas. For example, if the accountant's immediate superior instructs the accountant to record the physical inventory at its original costs when it is obvious that the inventory has a reduced value due to obsolescence, what should the accountant do? To help make such a decision, here is a brief general discussion of ethics and the "Standards of Ethical Conduct for Members."

Ethics, in its broader sense, deals with human conduct in relation to what is morally good and bad, right and wrong. To determine whether a decision is good or bad, the decision-maker must compare his/her options with some standard of perfection. This standard of perfection is not a statement of static position but requires the decision-maker to assess the situation and the values of the parties affected by the decision. The decision-maker must then estimate the outcome of the decision and be responsible for its results. Two good questions to ask when faced with an ethical dilemma are, "Will my actions be fair and just to all parties affected?" and "Would I be pleased to have my closest friends learn of my actions?"

Individuals in management accounting and financial management have a unique set of circumstances relating to their employment. To help them assess their situation, the Institute of Management Accountants (IMA) has developed the following "Standards of Ethical Conduct for Members."

#### STANDARDS OF ETHICAL CONDUCT FOR MEMBERS

Members of IMA have an obligation to the public, their profession, the organizations they serve, and themselves, to maintain the highest standards of ethical conduct. In recognition of this obligation, the IMA has promulgated the following standards of ethical conduct for its members. Members shall not commit acts contrary to these standards nor shall they condone the commission of such acts by others within their organizations.

Members shall abide by the more stringent code of ethical conduct, whether that is the standards widely practiced in their country or IMA's Standards of Ethical Conduct. In no case will a member conduct herself or himself by any standard that is not at least equivalent to the standards identified for members in IMA's Standards of Ethical Conduct. The standards of ethical conduct for IMA members are published in SMA 1C (Statement on Management Accounting).

## COMPETENCE

Members have a responsibility to:

- Maintain an appropriate level of professional competence by ongoing development of their knowledge and skills.
- Perform their professional duties in accordance with relevant laws, regulations, and technical standards.
- Prepare complete and clear reports and recommendations after appropriate analyses of relevant and reliable information.

## CONFIDENTIALITY

Members have a responsibility to:

- Refrain from disclosing confidential information acquired in the course of their work except when authorized, unless legally obligated to do so.
- Inform subordinates as appropriate regarding the confidentiality of information acquired in the course of their work and monitor their activities to assure the maintenance of that confidentiality.
- Refrain from using or appearing to use confidential information acquired in the course of their work for unethical or illegal advantage either personally or through third parties.

## INTEGRITY

Members have a responsibility to:

- Avoid actual or apparent conflicts of interest and advise all appropriate parties of any potential conflict.
- Refrain from engaging in any activity that would prejudice their ability to carry out their duties ethically.
- Refuse any gift, favor, or hospitality that would influence or would appear to influence their actions.
- Refrain from either actively or passively subverting the attainment of the organization's legitimate and ethical objectives.
- Recognize and communicate professional limitations or other constraints that would preclude responsible judgment or successful performance of an activity.
- Communicate unfavorable as well as favorable information and professional judgments or opinions.
- Refrain from engaging in or supporting any activity that would discredit the profession.

## OBJECTIVITY

Members have a responsibility to:

- Communicate information fairly and objectively.
- Disclose fully all-relevant information that could reasonably be expected to influence an intended user's understanding of the reports, comments, and recommendations presented.

## RESOLUTION OF ETHICAL CONFLICT

In applying the standards of ethical conduct, members may encounter problems in identifying unethical behavior or in resolving an ethical conflict. When faced with significant ethical issues, members should follow the established policies of the organization bearing on the resolution of such conflict. If these policies do not resolve the ethical conflict, such members should consider the following courses of action.

- Discuss such problems with the immediate superior except when it appears that the superior is involved, in which case the problem should be presented initially to the next higher managerial level. If a satisfactory resolution cannot be achieved when the problem is initially presented, submit the issues to the next higher managerial level. If the immediate superior is the chief executive officer, or equivalent, the acceptable reviewing authority may be a group such as the audit committee, executive committee, board of directors, board of trustees, or owners. Contact with levels above the immediate superior should be initiated only with the superior's knowledge, assuming the superior is not involved. Except where legally prescribed, communication of such problems to authorities or individuals not employed or engaged by the organization is not considered appropriate.
- Clarify relevant ethical issues by confidential discussion with an objective advisor (e.g., IMA Ethics Counseling service) to obtain a better understanding of possible courses of action. - Consult your own attorney as to legal obligations and rights concerning the ethical conflict.
- If the ethical conflict still exists after exhausting all levels of internal review, there may be no other recourse on significant matters than to resign from the organization and to submit an informative memorandum to an appropriate representative of the organization. After resignation, depending on the nature of the ethical conflict, it may also be appropriate to notify other parties.

## ETHICS HOTLINE

The Institute of Management Accountants has an ethics hotline exclusively for use by IMA members. Members can call toll-free at 1-800-638-4427 x1662 or send e-mail to [ethics@imanet.org](mailto:ethics@imanet.org). The IMA does not record phone numbers or e-mail addresses. Those who contact the hotline can be provided with a numerical code for identification, to maintain confidentiality.

The hotline was founded by Howard L. Siers (former chair, Ethics Committee) and initiated in 1991. Its purpose is to provide guidance to those members in the profession that find themselves in an ethical dilemma.

After a preliminary discussion of the problem, the caller is referred to an ethics counselor and receives a code number to preserve anonymity. The caller is informed of the hotline's intent that emphasizes confidentiality. The counselor will not provide a specific resolution but will explain how the dilemma relates to the provisions of the ethics standards. It is the responsibility of all IMA members to adhere to the "Standards of Ethical Conduct for Practitioners of Management Accounting and Financial Management." The Standards can be found in IMA's website.

North Carolina Triangle Area Chapter 406  
Institute of Management Accountants

PAST PRESIDENTS

|               |              |                       |               |              |                    |
|---------------|--------------|-----------------------|---------------|--------------|--------------------|
| 1967-<br>1968 | Raleigh      | Bill Lassiter         | 1986-<br>1987 | Raleigh      | Colby Daughtry     |
| 1968-<br>1969 | Raleigh      | David E. Rodger       |               | Durham       | Robert Wells       |
| 1969-<br>1970 | Raleigh      | William A.<br>Terrill |               | Fayetteville | Karin J. Cherry    |
| 1970-<br>1971 | Raleigh      | Thomas A.<br>Brafford | 1987-<br>1988 | Raleigh      | Gil J. Zuckerman   |
| 1971-<br>1972 | Raleigh      | Robert L. Horky       |               | Durham       | Charles Sisak, Jr. |
| 1972-<br>1973 | Raleigh      | Karen Lee<br>Schmitz  | 1988-<br>1989 | Raleigh      | A. Thomas Finnell  |
| 1973-<br>1974 | Raleigh      | Nicholas M.<br>Perry  |               | Durham       | Jackie Robinson    |
|               | Fayetteville | Clarence<br>Williams  |               | Fayetteville | Henry Harman, Jr.  |
| 1974-<br>1975 | Raleigh      | Larry Childers        | 1989-<br>1990 | Raleigh      | Anne C. Jones      |
|               | Fayetteville | Clarence<br>Williams  |               | Durham       | Nona D. Fisher     |
| 1975-<br>1976 | Raleigh      | William R.<br>Casteen |               | Fayetteville | Jackie Robinson    |
|               | Fayetteville | Richard C.<br>Jarvies | 1990-<br>1991 | Raleigh      | Herbert K. Bales   |
| 1976-<br>1977 | Raleigh      | Robert E.<br>Weaver   |               | Durham       | Clarice Wellman    |
|               | Fayetteville | John C. Gravlin       |               | Fayetteville | Rena L. Elliott    |
| 1977-<br>1978 | Raleigh      | R. Horace<br>Johnson  | 1991-<br>1992 | Raleigh      | Annette West       |
|               | Fayetteville | John C.<br>Ellsworth  |               | Durham       | Brown Cardner      |
| 1978-<br>1979 | Raleigh      | Steven L. Feiner      |               | Fayetteville | Phyllis MacDonald  |
|               | Fayetteville | Jerry T. King         | 1992-<br>1993 | Raleigh      | Rander Harris      |
| 1979-<br>1980 | Raleigh      | Robert D. Barry,      |               | Durham       | Carl Allen         |
|               | Durham       | Robert Taylor         |               | Fayetteville | Richard Jarvies    |
|               | Fayetteville | Jack A. Watson        | 1993-         | Raleigh      | Mike Joiner        |

North Carolina Triangle Area Chapter 406  
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|           |              | 1994                |           |              |                         |
|-----------|--------------|---------------------|-----------|--------------|-------------------------|
| 1980-1981 | Raleigh      | G. Rudy Wright, Jr. |           | Durham       | Chris Cameron           |
|           | Durham       | Larry Scott         |           | Fayetteville | Nona D. Fisher          |
|           | Fayetteville | Lester B. Sumner    | 1994-1995 | Raleigh      | Bill Bevan              |
| 1981-1982 | Raleigh      | Gonzalo Fernandez   |           | Durham       | Steve Drago             |
|           | Durham       | Thomas Adams        | 1995-1996 | Raleigh      | Todd Bishop             |
|           | Fayetteville | Gerald Teele        |           | Durham       | Anthony Ward            |
| 1982-1983 | Raleigh      | Ann H. Crumpler     | 1996-1997 | Raleigh      | Phil Horton             |
|           | Durham       | Ed McBride          |           | Durham       | Robbie Mitchell         |
|           | Fayetteville | William Epps        |           | Fayetteville | David D. Mitchell       |
| 1983-1984 | Raleigh      | C. Ray Pittman, Jr. | 1997-1998 | Raleigh      | Luise Kutsch-Barnes     |
|           | Durham       | Barbara Wilson      |           | Durham       | Alfreda Johnson         |
|           | Fayetteville | Hilda Kirby         | 1998-1999 | Raleigh      | Sue Durphy              |
| 1984-1985 | Raleigh      | Rudolf G. Ofcharfik | 1999-2000 | Raleigh      | BelindaLea Barnhart*    |
|           | Durham       | Lee Johnson         | 2000-2001 | Raleigh      | Phil Keren              |
|           | Fayetteville | Walter Swing        | 2001-2002 | Raleigh      | Ronald J. Lowell        |
| 1985-1986 | Raleigh      | David B. Plyer      | 2002-2003 | Raleigh      | Ronald J. Lowell        |
|           | Durham       | James Sweet         | 2003-2004 | Raleigh      | Kathy Santos-Rezendes*  |
|           | Fayetteville | Erdeen G. Chestnut  | 2004-2005 | Raleigh      | Chris Johnson           |
|           |              |                     | 2005-2006 | Raleigh      | Maksym (Max) Shyshnyak* |
|           |              |                     | 2006-2007 | Raleigh      | Kathy Santos-Rezendes*  |

\* Stephenson Chapter Competition Banner Winner

North Carolina Triangle Area Chapter 406  
Institute of Management Accountants

THE ROBERT HORKY AWARD

The Robert Horky Award is given annually by the Board of Directors to a member of the Chapter, who is not an officer, who has contributed materially to the success of the Chapter during the year.

|      |                              |
|------|------------------------------|
| 1986 | Robert L. Horky              |
| 1987 | Craig G. Dalton              |
| 1988 | Lowell E. Miller             |
| 1989 | Michael J. Mackey            |
| 1990 | David P. Caccamo             |
| 1991 | Gilroy Zuckerman             |
| 1992 | Mike Joiner                  |
| 1993 | Todd Bishop                  |
| 1994 | Luise Kutch-Barnes           |
| 1995 | Timothy Romocki              |
| 1996 | James L. Burke               |
| 1997 | Belinda Lea Barnhart         |
| 1998 | Keith Hermann                |
| 1999 | Jennifer Harris              |
| 2000 | Katherine A. Santos-Rezendes |
| 2001 | Max Shyshnyak                |
| 2002 | Nancy Smith                  |
| 2003 | Teresa Muncer-Shimp          |
| 2004 | Katherine A. Santos-Rezendes |
| 2005 | Katherine Santos-Rezendes    |
| 2006 | Vance Josey                  |
| 2007 | Kimberly Langley             |

THE RANDER HARRIS AWARD

The Rander Harris Award is given annually by the Board of Directors to a member of the Chapter, who has demonstrated Rander's spirit of giving to the organization and for their accomplishments in promoting chapter goals and growth.

|      |                   |
|------|-------------------|
| 2003 | Rander Harris     |
| 2005 | Ron Lowell        |
| 2006 | James Santaniello |
| 2007 | Bob Boone         |

North Carolina Triangle Area Chapter 406  
Institute of Management Accountants

EMERITUS LIFE ASSOCIATES AND MEMBERS

A member of the Institute having retired from active business, reached age 55, completed 20 years of membership with the Institute, including five years as an elected National, Regional, or chapter officer or director, shall be designated an Emeritus Life Member (ELM) and pay 25% of regular member dues.

Emeritus Life Associates are members having attained the designation of ELA prior to 7/1/93 and may elect to become an ELM and receive benefits (like the magazine) or remain an ELA and not receive the benefits.

Thomas N. Braddford  
Franklin L. Buchheit  
Kenneth G. Evancie  
Gonzalo Fernandez  
Arthur G. Gillum  
William H. Green  
Clarence R. Halcy  
M. James Hollis  
B. Hooks  
Ralph E. Kern  
Lawrence S. Lanset  
Martin R. Marks  
John C. Marsh  
Robert D. McGee  
Jerome A. Power  
Taylor T. Thorne  
William J. Wall  
Whitten P. Windham

North Carolina Triangle Area Chapter 406  
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STUART CAMERON McLEOD SOCIETY

Membership in the Stuart Cameron McLeod Society (SCMS) consists of current and past national officers and directors of the Institute of Management Accountants. The purpose of the SCMS is to promote and perpetuate friendships developed through service in IMA. It also provides an opportunity to its members, through their interest and experience, to offer leadership and guidance in the development, growth and expansion of the Institute of Management Accountants. The SCMS was formed in 1934 as the Spot Club. In 1957, the name was changed in recognition of Stuart Cameron McLeod, one of the founders of the Spot Club and Executive Secretary of the IMA from 1919 until his death in 1944.

The trophy awarded to the third place chapter in the Stevenson Competition is sponsored by the SCMS. The Society also sponsors the "S. Alden Pendleton Award for Excellence in the Community Responsibility Program of IMA". In addition, the Society provides judges for the selection of the Stuart Cameron and Margaret McLeod Scholarships.

SCMS is also known as the "Society for Continuing Membership Services". This describes your fellow chapter members who are active members of the Stuart Cameron McLeod Society.

The following SCMS members belong to our chapter:

Bill Bevan  
Dr. R. Lee Brummet  
Steve Drago  
Rander Harris  
Bob Horky  
Raymond H. Johnson  
Jim Santaniello  
Charles T. Smith, Jr.  
Ronald Lowell

North Carolina Triangle Area Chapter 406  
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The Institute of Certified Management Accountants

The Institute of Management Accountants (IMA) established the Institute of Certified Management Accountants (ICMA) in 1972 to implement and administer the Certified Management Accountant (CMA) Program and in 1996 the Certified in Financial Management (CFM) Program. The ICMA evaluates the credentials of candidates, administers the examination, grants certificates, and ensures the CMAs and CFMs continue to meet the professional requirements necessary to retain their certificates in good standing. The ICMA is governed by the ICMA Boards of Regents. The Board members are appointed by the President of the IMA for three-year terms, with one-third of the members appointed each year. The ICMA staff plans and implements the ICMA activities within the framework of policies and procedures established by the ICMA Board of Regents.

All ICMA certification exams are given in a computer based format through Sylvan Technology Centers (see attached). Candidates are authorized for an examination by the ICMA, and then schedule the exam at a Sylvan Technology Center through their national registry. All examination parts (Parts 1, 2CMA, 2CFM, 3 and 4) are now available at all locations on a continuous bases (except Sundays and holidays) Candidates receive immediate feedback on their performance before leaving the testing center. New applicants to the ICMA should seek admission 60-90 days before they wish to take the exam. Continuing candidates should register for parts 4-6 weeks prior to taking the exam.

TESTING SITES FOR:

The Certified Management Accountant (CMA) Exam  
The Certified in Financial Management (CFM) Exam

Please contact Thomson Prometric Testing Centers at 1-800-479-6370 or visit their website at [www.prometric.com](http://www.prometric.com) to find the location nearest you.

NORTH CAROLINA

|            |              |
|------------|--------------|
| Asheville  | 828-253-4224 |
| Charolotte | 704-364-7758 |
| Gastonia   | 704-853-2038 |
| Greensboro | 336-854-4230 |
| Greenville | 252-756-0342 |
| Raleigh    | 919-846-1933 |
| Wilmington | 910-392-0891 |

REVIEW COURSE FOR:

The Certified Management Accountant (CMA) Exam  
The Certified in Financial Management (CFM) Exam

North Carolina Triangle Area Chapter 406  
Institute of Management Accountants

The Institute of Certified Management Accountants cont'd

GLEIM

Your IMA Chapter has entered into a partnership with Gleim to ensure your success on the CMA/CFM exams! We are working together to provide you with the necessary tools that you need to prepare for these difficult exams.

Gleim provides CMA/CFM candidates with an extensive self-study course for both the old and new CMA/CFM exams. Our most successful candidates use the Complete CMA System with the Online Course. This system combines books, software, audio reviews, the Online Course, and a personal counselor (a real live person!) to maximize your available study time. Because we identify and focus on your weak areas, you will not spend any more time preparing than is necessary to guarantee success. The Complete CMA System with the Online Course GUARANTEES that you will pass each section on the first try. We are here to save you time and money.

Because of your membership in the North Carolina Triangle Area Chapter, you are eligible for significant discounts (20% to 32%) on any of Gleim's CMA/CFM materials, as well as our Online CPE.

To take advantage of the discounts that are offered, please contact Matthew Cmar at (800) 874-5346 ext. 135. [matthew.cmar@gleim.com](mailto:matthew.cmar@gleim.com) Fax 888-375-6940

PREPanywhere

Our chapter is also the co-sponsor of an effective preparation tool—PREPanywhere. PREPanywhere is a web-based review course for the CMA and CFM exams that delivers regularly scheduled, live instruction via the internet. For information, go to [www.PREPanywhere.com](http://www.PREPanywhere.com).

North Carolina Triangle Area Chapter 406  
Institute of Management Accountants

The Institute of Certified Management Accountants cont'd

North Carolina Triangle Area /Duke University Partnership

Are you ready to:

- join an elite group of professionals who have advanced beyond the practical accounting skill set?
- evolve into a strategic business partner with management-level skills required to maximize value and build quality financial practices into your organization?

If so, you will be interested in The Institute of Management Accountants' (IMA) Certified Management Accountant (CMA) Certification Program and its new CMA Learning System offered at Duke. Call 919-684-6259 or toll free 866-edu-duke. IMA members receive a \$100 discount on entire review program, so please mention your membership upon registering.

Your IMA Chapter has entered into a partnership with Duke University to ensure your success on the CMA/CFM exams! We are working together to provide you with review classes that you need to prepare for these difficult exams. Please click here for more information: [www.learnmore.duke.edu/managerialaccounting](http://www.learnmore.duke.edu/managerialaccounting)

Starting each Fall, Duke will offer preparatory classes for The Institute of Management Accountants' (IMA) Certified Managerial Accountant exams. Through a partnership with IMA, Duke will offer the CMA Learning System: The Complete Solution to Prepare for the Newly Revised Certified Management Accountant (CMA) Exam.

North Carolina Triangle Area Chapter 406  
Institute of Management Accountants

CAROLINAS COUNCIL

Your chapter is a member of the Carolina Council of the Institute of Management Accountants.

The purpose of the Council is to promote and facilitate cooperation and communication between chapters in North and South Carolina in the areas of education and professional development, employment, special activities, new chapter formation, and other activities which broaden the opportunities and benefits of IMA for members in the Carolinas.

The Council sponsors a professional development Accounting Conference each year. Also sponsored by the Council are two-state employment service, chapter management workshops, the Carolinas hospitality room at the IMA International Conference in June each year and an annual intra-council competition to determine the "best" and "most improved" chapters in the Carolinas. The winners receive the Charles W. Lent Trophy and the Carolinas Trophy, respectively.

Each chapter has three official delegates to the Council, but every IMA member is welcome to attend Council meetings.

Founded in 1971 when there were nine chapters and about 2,000 members in the two Carolinas, the Council now includes 22 chapters with more than 4,000 members.

The Carolinas Council (<http://www.imacarolinascouncil.org>) generally offers additional CPE credits each quarter in locations throughout the Carolinas.

The Fall Council Meeting is October 26-27, 2007 in Florence, SC followed by the Winter Meeting in February 2008. The Spring Conference is at Ocean Creek Resort, N. Myrtle Beach, SC from April 25 - 26, 2008.

OUR CHAPTER'S CAROLINAS COUNCIL DELEGATE

Kathy Santos-Rezendes  
Past President

Carolinas Council Board  
2007 - 2008

|  |                            |
|--|----------------------------|
| President                              | Brad Ledford, CPA          |
| President Elect                        | Ron Lowell                 |
| Vice President Accounting Conference   | Michael Jordan             |
| Committee Member                       | Heidi Kerns                |
| Committee Member                       | Hunter Blake               |
| Committee Member                       | Wendy Whittaker            |
| Committee Member                       | Jennifer Shoffner          |
| Secretary                              | Bridget Rosenberg          |
| Treasurer                              | James R. Webb              |
| Vice President Operations              | Ron Lowell                 |
| Meetings                               | Ron Nicholson              |
| Publicity                              | Kimberly J. Coleman        |
| Website                                | Kathy Santos-Rezendes, CMA |
| LTS Chapter Services                   | Jim Lane                   |
| Vice President Services                | Heidi Kerns                |
| Audit                                  | Jennifer Shoffner          |
| Program Roster                         | Peggy Reeves               |
| Student Affairs                        | Christina Cook             |
| Chair Corporate & Academic Development | Tony Caspio                |
| Chair Long Range Planning              | James T. Santaniello, CMA  |
| Member                                 | Open                       |
| Member                                 | Open                       |
| Member                                 | Open                       |
| Chair of Professional Education        | Vacant                     |
| Member                                 | Open                       |
| Member                                 | Open                       |
| Chair of Chapter Revitalization        | Janice Bowers              |
| Member                                 | James T. Santaniello, CMA  |
| Member                                 | Open                       |

North Carolina Triangle Area Chapter 406  
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|                                |   |
|--------------------------------|---|
| Member                         | Open  |
| Member                         | Open  |
| Chair Nominating Committee     | Open  |
| SCMS Liaison                   | Joe Luther  |
| Director of Regional Directors | Ev Walker   |
| Regional Directors             | Jennifer Shoffner (Charlotte & Gaston Carolinas)            |
| Regional Directors             | Kathy Santos-Rezendes (NC Triangle & Piedmont Greensboro)   |
| Regional Directors             | Freida Creech, CMA (Spartanburg & Greater Greenville)       |
| Regional Directors             | (Catawba Valley & Piedmont Winston-Salem)                   |
| Regional Directors             | Janice Bower (Florence & Wilmington)                        |
| Regional Directors             | Janice Bower (Charleston) Robyn Verdery & Veronica Brownlee |
| Regional Directors             | (Augusta & Columbia)  |



IMA'S 89TH ANNUAL CONFERENCE & EXPOSITION



JUNE 14-18, 2008  
**TAMPA-FL**  
TAMPA CONVENTION CENTER

Make plans to attend the 89th Annual IMA Conference & Exposition

With almost 1,000 attendees each year, IMA's Annual Conference & Exposition is the definitive event for managerial finance and accounting professionals. Take advantage of four days of interactive sessions that will meet your professional development needs. This is the IMA event you don't want to miss.

[http://www.imaconference.org/pdf/AC08\\_Tampa\\_Flyer.pdf](http://www.imaconference.org/pdf/AC08_Tampa_Flyer.pdf)

# NC TRIANGLE #406 MEMBERSHIP

2007 - 2008

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Institute of Management Accountants

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