



The Motivator

North Carolina Triangle Area Chapter #406
Institute of Management Accountants

May 2004

May 20, 2004 Dinner Seminar

Date & Time: Thursday, May 20, 2004, 6 PM

Place: RTP Marriot, off Miami Blvd.

\$25 IMA Chapter #406 as of the 1st of the current month ; \$30 IMA -members; \$35 non-members –Register before 5/17 \$30 IMA Chapter # 406 as of the 1st of the current month; \$35 IMA members ; \$40 non-members–Register after 5/16

Speaker: Dr. Mike Walden, William Neal Reynolds Distinguished Professor & Extension Economist for NC State University's Dept. of Agricultural & Resource

Economics Topic: Economic Update

Field of Study: Personal Development

Recommended CPE: 1 Hour Level: Basic

Prerequisites: None Advance Preparation: None

Teaching Method: Lecture/Discussion

May 15, 2004 Seminar

Date & Time: Saturday, May 15, 2004

Place: Campbell University RTP Center, located on Aviation Parkway in Morrisville

Information and Registration - http://www.imanctriangle.org/2003_cpe_reg.htm

Speaker: Thomas E. Vass, Director of the newly formed Private Capital Markets Entrepreneurial Institute, a division of The Business Financial Advisory Corporation of Cary, N.C.

Topic: "Understanding the Private Capital Markets and How Deals Get Done: A Lesson for Lawyers, Accountants, Investment Advisors and CEOs Who Are Interested In Learning How the Private Capital Markets Can Work To Their Advantage."

Field of Study: Personal Development

Recommended CPE: 8 Hour Level: Basic

Prerequisites: None Advance Preparation: None

Teaching Method: Lecture/Discussion

May 22, 2004 Seminar

Date & Time: Saturday, May 22, 2004, 8:00-12:00 and 1:00-5:00

Place: [Robert Half Offices](#), 3605 Glenwood Avenue, Suite 390, Raleigh, NC

Information and Registration - http://www.imanctriangle.org/2003_cpe_reg.htm

Speaker: Lea A. Strickland, CMA CFM CBM

Topic: May 22, 2004 Enterprise Risk Workshop & Sarbanes Oxley Over view, 8:15 – 12:00

Speaker: Anne R. Harttree, President of AISIS Performance Advisors, Ltd

Topic: Payroll – The Big Five W's. 1:00 – 5:00

Field of Study: Personal Development

Recommended CPE: 8 Hour Level: Basic

Prerequisites: None Advance Preparation: None

Teaching Method: Lecture/Discussion

The North Carolina Triangle Chapter of the IMA is registered with the NC State Board of CPA Examiners as a sponsor of continuing professional education. Complaints or comments regarding registered sponsors may be addressed to the North Carolina State Board of CPA Examiners, PO Box 12827, Raleigh, NC 27605-2827

Wine Tasting Social Event

There will be a Wine Tasting sponsored by the Chapter on Thursday, May 27 from 7 to 9 PM at the Wine Merchant located in the Ridgewood Shopping Center (corner of Wade Ave. and Ridge Rd.). Cost is \$20 per person which includes hors d'ourves. Our Host will be Shane Angley. For additional information, contact Jennette King @ 851 3385 (H) or 992 8868(W)

Dear Fellow IMA'ers:

We had an excellent meeting in April, with Bob Bazemore Corporate Controller, Progress Energy speaking on the Value of Certifications in the Workplace. Bob's topic was most fitting for the night as it was also CMA/CFM Recognition night as we honored our newly certified members over the past 12 months.

Do you have a certification? Please tell friends and co-workers of this local opportunity to obtain CPE at a reasonable cost! There are FOUR opportunities in May (see below). See our website for details and registration. www.imanctriangle.org.

Our dinner speaker for May 20, 2004 is Dr. Michael L. Walden, a William Neal Reynolds Distinguished Professor and Extension Economist in the Department of Agricultural and Resource Economics at North Carolina State University. His Ph.D. degree is from Cornell University and he has been at N.C. State since 1978. Dr. Walden has teaching, research, and extension responsibilities at NCSU in the areas of consumer economics, economic outlook, and public policy. He has published three books and over 200 articles and reports.

Our last dinner is saved to honor the past presidents of IMA, including the Durham and Fayetteville Chapters. And, as is the custom, we will be announcing our Horky Award winner. A full and fun night to end a very successful year for this organization.

Please go to the website and sign up for our next dinner meeting as it is the last one of the year. Dr. Walden is a great speaker who will talk about the economy. We will also be honoring our past presidents so come for some networking, a great dinner and to hear an interesting speaker (and for all that, you also get 1 CPE)!

Date	Topic	Instructor	
May 15, 2004	<u>Managing your Momentum Series</u> Session 2: Pick up the Pace	6 HOURS CPE 8:30am to 4:30 pm	LaQuinta, Cary, NC
May 15, 2004	<u>UNDERSTANDING THE PRIVATE CAPITAL MARKETS: A CONTINUING EDUCATION SEMINAR FOR ATTORNEYS, CPAs, CMAs, AND REGISTERED INVESTMENT ADVISORS.</u>	THOMAS E. VASS, CEO, THE PRIVATE CAPITAL MARKETS ENTREPRENEURIAL INSTITUTE, A DIVISION OF THE BUSINESS FINANCIAL ADVISORY CORPORATION	<u>Campbell University RTP Center</u> 808 Aviation Parkway, Morrisville, NC 27560 Phone: 919-468-0323 Aviation Parkway exit off of I-40 going away from the airport in the South Port Business Park
May 22, 2004	Enterprise Risk Workshop	Lea A. Strickland, CMA CFM CBM	<u>Robert Half Offices</u> , 3605 Glenwood Avenue, Suite 390, Raleigh, NC
May 22, 2004	Payroll – The Big Five W's	Anne R. Harttree, President of AISIS Performance Advisors, Ltd	<u>Robert Half Offices</u> , 3605 Glenwood Avenue, Suite 390, Raleigh, NC

We'd like feedback on how you currently get your continuing professional education credits (CPE's) and how you would prefer to get these in the future. We try to offer various CPE opportunities throughout the year, but we want to find out how we can better meet your CPE needs. We appreciate your taking a few minutes to complete this survey as we vitally need your input so that we can fill your needs for CPE next year. Please go to our website www.imanctriangle.org/IMA_CPE_Survey1.doc to fill the form on line or you can complete a copy at the dinner meeting.

We have many Board positions filled, including some co-directorships. It's exciting to see the response we have had this year for involvement. It will make it possible to do even more next year to provide the membership with value added benefits for their membership. The more we have involved, the less work for each person and the more we can do for the membership in keeping this a vibrant and viable organization.

Thank you for all of you who helped support Bob Boone's efforts on behalf of the March of Dimes in April. It was a success on all counts. I hope you will look forward to helping next year.

In closing with this, my last letter for the year, I want to thank all of the people who have served on the Board, graciously volunteered their time and energy at the RBC center and to all those who have faithfully been attending the dinner meetings this year. I can't tell you how much I appreciate the hard work you put in that made my job easier. It has been both a personal and professional pleasure serving as your President. I know that I leave with a great person, Chris Johnson as President, who is going to lead this full and motivated board on to even better things. See you at dinner !

Kathy Santos-Rezendes
IMA Chapter #406 President

ADVERTISE IN THE MOTIVATOR

Would you like to get your message out to 500 of the area's accounting and finance professionals? We are planning on running ads in The Motivator. We are also looking for sponsors to pick up mailing costs of the monthly newsletter in exchange for exclusive advertising opportunities. If you are interested in taking advantage of these opportunities, please contact Teresa Muncer -Shimp, 859-5550 ext. 206, tshimp@nc.rr.com

VISIT THE IMA CAROLINAS COUNCIL WEBSITE @ <http://www.imacarolinascouncil.org>

The website has all the speaker and registration information. For more information go to the council's [website](http://www.imacarolinascouncil.org/news.htm) <http://www.imacarolinascouncil.org/news.htm>

March of Dimes Walk America - THANK YOU

Thanks to all the volunteers who made this fund-raising program a success on April 24. You can also help support this worthwhile cause by participating as a walker/fund-raiser, and/or contributing cash or check. See the Website for additional details, or contact Bob Boone, Chapter Community Service Director at 571-7828 or rdboone2000@yahoo.com

Mark your calendars for the 3rd Thursday of each month at the Marriott Hotel for dinner meetings and register for any of our meetings at our web site www.imanctriangle.org.

MICHAEL L. WALDEN – May's Dinner Speaker

Dr. Michael L. Walden is a William Neal Reynolds Distinguished Professor and Extension Economist in the Department of Agricultural and Resource Economics at North Carolina State University. His Ph.D. degree is from Cornell University and he has been at N.C. State since 1978.

Dr. Walden has teaching, research, and extension responsibilities at NCSU in the areas of consumer economics, economic outlook, and public policy. He has published three books and over 200 articles and reports. He has served on several local and state level commissions, including the Governor's Welfare Reform Task Force and the School Capital Construction Legislative Study Commission.

Dr. Walden can be frequently seen, heard, and read in the media. He has both daily and weekly radio programs aired on stations around North Carolina for which he has won two national awards. He is often interviewed on local TV and radio news broadcasts, has appeared on *NBC*, *CBS*, and the *Newshour With Jim Lehrer*, and is frequently quoted in such newspapers as the *Raleigh News and Observer*, *The Charlotte Observer*, *The Boston Globe*, *The Wall Street Journal*, and *The Washington Post*. His biweekly column, *You Decide*, is carried by over forty newspapers in the state.

Dr. Walden directs the semiannual economic forecast, *The North Carolina Economic Outlook*. He has won a *Premiere Forecaster Award* from the American Agricultural Economics Association, and he has won three *Applied Consumer Economics Awards* from the American Council on Consumer Interests. He lives in Raleigh, North Carolina with his wife, Mary.

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LOG ONTO THE CHAPTER'S WEBSITE

The Chapter's web site can be found at www.imanctriangle.org. Keep up with the latest information about chapter events and upcoming CPE opportunities.

EMPLOYMENT OPPORTUNITIES – From the Chapter's Employment Director

The Chapter serves its members by connecting those seeking positions with employers that have positions available. The Chapter's Director of Employment is Chris McKittrick. For further information or to submit a resume please e-mail Chris McKittrick at ctm1999@hotmail.com.

Gathering of Angels Plans Venture Presentation Session in Southern Pines

By Rick Smith, Local Tech Wire

SOUTHERN PINES – The Gathering of Angels has its eyes on North Carolina.

The company, led by Tarby Bryant, will host a meeting to bring together angel investors and high-tech Companies on May 19 at Pine Needles Lodge in Southern Pines. Bryant will be working with investment advisor Thomas Vass to put on the event. Vass said he wants to bring four North Carolina -based and one out-of-state startup firms to present at the first session. Gathering of Angels meetings include four to five presentations, each running 20 minutes, followed by question-and-answer sessions.

“We have successful monthly meetings in Atlanta, Phoenix and Dallas, and we want to establish operations in North Carolina,” Bryant said in a statement. “We believe that the counties adjacent to the Research triangle Park represent the greatest potential for bringing angel investors together with high-growth companies.”

Bryant also offers mentoring services to firms through his Anasazi Capital Corporation.

Vass said he sees the Moore County region as having “a great potential to become the new private capital markets leader in North Carolina, just like Charlotte became a leader for commercial banks.” He said that many companies “would like a way to meet angels in the Sandhills.”

Companies making presentations are charged a fee of \$200. Gathering of Angels said it has helped 14 companies land funding through these meetings.

For more information, contact Vass (tvass@corporateinvestment.net).

Triangle Chapter # 406 BOARD OF DIRECTORS**Competition Year 2003-2004**

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North Carolina Triangle Area Chapter #0406

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