

NorthEast Regional Council 2008 Fall Conference October 19-21, 2008



Earn
18.5 CPE's!

The [NorthEast Regional Council](#) is proud to present additional opportunities for Professional Educational. This program is designed to enhance your professional knowledge. Track 1 offers skills and topics for Management Accountants delivered by speakers who are experts in their field, while Track 2 offers an in-depth review of Part 3 of the CMA Certification program.

Who should attend? [Accounting , Management and Finance Professionals](#)

Several reasons why you don't want to miss this opportunity:

- To expand your network of contacts
- To sharpen your skills and bring new ideas to your company
- To satisfy CPE requirements at an incredibly attractive price
- To have a live study course in preparation of successfully passing Part 3 of the CMA Exam

Travel arrangements: The Mystic Hilton Hotel in Mystic, CT has rooms available to participants at the rate of \$159 per night. The hotel is conveniently located one block from I-95 at 20 Coogan Boulevard in picturesque Mystic Ct. Olde Mystic Village and the Mystic Aquarium are within walking distance of the hotel. Other local attractions include the Institute for Exploration and Mystic Seaport Museum and , of course, Mystic Pizza on Main Street, made famous in the movies. Call 1-860-572-0731 to make your reservation.



Mystic Hilton Hotel, Mystic Connecticut

SPEAKERS

Hamish Blackman

Hamish is the President of the Wellness Corporation. Hamish has extensive experience in organizational diagnosis, group facilitation, leadership development, and project design. As a mediator, he works with groups to resolve conflicts; many of which have their roots in negative patterns of communication. Hamish likes to believe he is sensitive and inclusive in his communication & that he uses humor effectively; he is, nevertheless, all too familiar with the taste of his own foot. Hamish has worked extensively with the private & public sector, community groups, non-profit organizations, and higher education institutions.

Randy Dean

Randy is the President of Randall Dean Consulting & Training, LLC. Randy is a full member of the National Speakers Association and has delivered entertaining, informative speaking and training programs for an impressive list of organizations including Proctor & Gamble, Michigan State University, Westinghouse Electric Company, and the Institute of Management Accountants. Randy's objective in this program is to share several proven strategies for better managing time, being more productive and getting more organized. This program is perfect for any manager or professional that has too much to do and not enough time to do it, wants to find ways to save hours and minutes every day and doesn't mind a chuckle now and then, too!

Bob Demac

Bob is a 1987 graduate of Providence Collage and has been in the Banking and Financial Services industry prior to his 15 years of experience in the staffing industry. Bob has been with his current employer – Kforce, for the last 8 years and holds the title of Market Vice President of the Northeast with responsibilities for Finance and Accounting operations in New England and New York/New Jersey Markets.

John DeMauro, Principal

John leads the firm's IT Audit and Assurance services. He has over 21 years of IT management, application development, network administration and security experience. He has significant experience in performing IT audits and has extensive knowledge of pertinent regulatory concerns (FFIEC, Interagency Guidelines and GLBA). He maintains the following credentials: Certified Information Systems Auditor (CISA); Certified Information Systems Manager (CISM); and Certified Information Systems Security Professional (CISSP).

Alden Flanders

Alden Flanders is a consultant to religious congregations and other non-profit organizations and a coach to those who provide leadership for them. He has done extensive work in board development, conflict resolution, and the analysis of emotional systems. An ordained Episcopal Priest who has served congregations in Massachusetts and New Hampshire and taught at a church boarding school in New Hampshire, he holds degrees in theater, theology, and education.

Thomas W. Grottke, CPA

Tom has over 22 years of experience assisting clients improve business practices, evaluate controls, audit and review their systems and processes, select and implement new applications. Mr. Grottke has been the lead audit partner, manager and senior accountant on numerous firms in New England and New York State with CCR and with his other past accounting firms, KPMG Peat Marwick LLP and Arthur Andersen & Company. Tom is a graduate of the University of Connecticut and holds a Bachelor of Science degree in accounting.

Ian Kennedy

Ian is President of The Schegg Group, LLC, a Human Resources consulting firm focusing on career transition, recruiting and executive coaching. Ian was CEO of Australian Skandia, Ltd., in Sydney, Australia. Prior to that he was a Senior VP and Director of Customer Service at American Skandia, Inc.. He also started Ian Kennedy Associates, a consulting firm focusing on leadership development, organizational change and team building. Ian earned his MBA from Babson College, Wellesley, MA and his BA in Accounting from Concordia University, Montreal, Canada. He is qualified in MBTI (Myers Briggs Type Indicator) and is certified to teach the Organization Workshop, developed by Barry Oshry, Power and Systems, Inc.

Howard Kraft

Howard Kraft leads Mercer's Northeast Zone Health and Productivity Management Specialty Group. Howard's area of expertise include health and productivity analysis, integrated care management strategy development, onsite clinical/health services, and linking healthcare and absence management data and operations.

His focus is on helping clients quantify the impact of health of business success and aligning strategies, resources, policies and incentives to optimize an employer's investment in its human resources. Howard received an MA degree in Exercise Physiology from Adelphi University and a B.S.E. from the State University of New York. He also attended the Emory Business School Executive Management Program.

SPEAKERS

Anthony J. Kvedar, Jr.

Tony holds a BS in Business Administration and a MBA from the University of Vermont. He received his CMA in 1994, CPA in the state of Vermont in 1996 and Certified Rate of Return Analysis in 2004. Tony has 22 years experience in the regulated utility field in accounting, financial planning and rate making. He is currently employed by Green Mountain Power Corporation. Tony is an adjunct instructor in Accounting at the University of Vermont and has also been an adjunct instructor in accounting, finance, and income tax at Trinity College. He has served on various committees including past President of NERC and national board member of the IMA.

Thomas S. Lawler, SSA

Tom is a Supervisory Special Agent (SSA) with the FBI, New Haven Division. He earned his Bachelor of Science in Computer Science from Marist College in Poughkeepsie, New York. Tom worked as a computer programmer for the IBM Corporation prior to employment with the FBI. During the past 11 years, Tom has been a Cyber investigator, Computer Analysis Response Team (CART) Forensic Examiner and Supervisor in both the Counterterrorism and Cyber programs. He is currently assigned as the supervisor of the New Haven Division Cyber squad with responsibilities for conducting Cyber counterterrorism, Cyber counterintelligence, computer intrusion, crimes against children, copyright infringement, identity theft, Internet fraud and extortion and harassment investigations.

Robb D. Morton

Robb holds a BS in Accounting and Finance from the University of Maine and a MS in Professional Accounting from the University of Hartford. He received a Masters in Taxation degree from the University of Hartford in 2003. Robb has 27 years experience in public and management accounting. He is a CPA and CMA and earned a CFM from the IMA. Robb has taught classes in managerial accounting and auditing as part of the Masters Program at Western New England college. He served as a lead instructor for the Becker CPA review course for 10 years and has taught CMA review courses throughout New England. Robb is a Managing Partner in the CPA firm of Boisselle, Morton & Associates, LLC. He has served on many committees including Past President of the IMA Springfield Chapter, Past President of NERC and currently serves on the IMA Board of Directors.

Charles Scharnagle

Charles Scharnagle is the CIO for the government of the Mohegan Indians of Connecticut based in Uncasville, Ct., that serves the interests of over 2,000 tribal members throughout the U.S. Chuck has spent the past 20 years in the high-tech, manufacturing and government environments including the headquarters for Black & Decker, Fruit of the Loom, EMC, Pegasystems and International Power America. He has experience implementing disaster recovery systems, redesigning computer centers and managing international support organizations. Chuck holds a B.S. degree in Information Systems Management from the University of Maryland, Baltimore County and a Masters in Management from Loyola College in Baltimore, Maryland. He is also a member of the Society for Information Management (SIM).

Jeffrey C. Thomson

Jeff is acting President and CEO of the IMA. He is responsible for leading and directing IMA's operations, programs, products and services. He was previously IMA vice president, research and applications development. Mr. Thomson conceived and launched the IMA Research Center of Excellence, which has delivered global applications, tools and guidance enabling management accountants to perform as strategic business partners. He is also responsible for guiding the associations' global strategic planning process and serves as program chair for IMA's Global Conference and Annual Conference and Exposition. Prior to joining IMA, Jeff worked at AT&T for over two decades where he served in various financial, strategic and operational roles. An author of numerous trade articles, Mr. Thomson has spoken globally on a variety of topics including financial leadership, enterprise risk management, and competitive analysis. Jeff holds an M.S. degree in Statistics from Montclair State University, a certificate in Finance and Accounting from the Wharton School and completed the Columbia University Senior Executive Leadership Program.

Phyllis Winters, MS, CPA

Phyllis is the President of Information Technology Group. She holds a Master of Science degree in Computer and Information Science from Rensselaer Polytechnic Institute and has extensive experience in computer systems engineering, database management systems, networking, EDI (an e-commerce standard), accounting and management information systems and computer systems training. Phyllis is a former member of the Board of Governors of the Connecticut Society of CPA's. She has written numerous computer related articles and has presented seminars and other related teaching assignments to business organizations in Connecticut.

Sunday, October 19, 2008

Registration - 6:00 - 7:00 PM

8:00 - 11:00 PM Casino Road Trip—Mohegan Sun

Monday, October 20, 2008

7:15 - 8:00 AM Continental Breakfast

8:00 AM - 5:30 PM - Concurrent Track
CMA Review Part 3 - Presented by Tony
Kvedar & Robb Morton

8:00 - 10:15 AM New Microsoft Technologies

You'll Learn:

- ◇ New Microsoft Operating Systems including Server 2008 and Vista
- ◇ New Communications Technologies, Office, Office Communicator and Unified Messaging
- ◇ Hardware Advancements, Networking & More

Presented by Steven Saslow

10:30 - 12:00 PM Microsoft Office 2007

You'll Learn:

- ◇ Changes and New Features in Office 2007
- ◇ Tips and Tricks in MS Office 2007
- ◇ Take a Tour - Excel, Word, Power Point, Visio, Publisher and Outlook

Presented by Phyllis Winters

Monday, October 20, 2008

Lunch 12:00 - 1:00 PM Why Do We Need Civility in the Workplace?

You'll Learn:

- ◇ How to identify the quality of relationships in the workplace
- ◇ Who is responsible for maintaining civility
- ◇ A look into the future of conduct in the workplace

Presented by Alden Flanders

1:00 - 2:15 PM Foot in Mouth-Head in Hands; Recovering from the Embarrassing Incident

You'll Learn:

- ◇ How to handle an embarrassing moment
- ◇ How to avoid these situations
- ◇ Damage control when we invariably fail to do so

Presented by Hamish Blackman

2:30 - 3:45 PM Employee Benefit Costs

You'll Learn:

- ◇ The strain that rising employee health benefits has put on companies and employees
- ◇ Address the real drivers of utilization and cost
- ◇ Creative options designed to improve health, manage costs and improve workforce productivity

Presented by Howard Kraft

Monday, October 20, 2008

3:45 - 5:30 PM Career Coaching

You'll Learn:

- ◇ How career coaching can help you define your career path and keep you on track
- ◇ External and internal career coaching is a necessity not a luxury
- ◇ What you need to know for your personal career growth

Presented by Ian Kennedy

7:00 - 10:00 PM Hospitality Gathering

Tuesday, October 21, 2008

8:00 AM - 5:30 PM - Concurrent Track -
Tuesday CMA Review Part 3

7:15 - 9:00 AM Breakfast Buffet - Finding an
Extra Hour Every Day: Time Management Techniques

You'll Learn:

- ◇ Strategies for better managing your projects and tasks
- ◇ Mitigating calendar overload and over-scheduling
- ◇ PDA or planner tricks and strategies

Presented by Randy Dean

Tuesday, October 21, 2008

9:00 - 10:15 AM Who's Reading Your Email?

You'll Learn:

- ◇ How private is your email at the workplace
- ◇ Sent any good jokes lately?
- ◇ Your employer's rights

Presented by Charles Scharnagle

10:30 - 12:00 PM Staffing in New England

You'll Learn:

- ◇ Winning strategies on job search for candidates
- ◇ Reliable cost effective staffing solutions
- ◇ Understanding the job market from both a candidate's and a client's perspective

Presented by Bob Demac

12:00 - 1:30 PM Lunch "The New IMA"

You'll Learn:

- ◇ Regulatory agencies, standard setters and education attitudes & challenges
- ◇ What needs to change and why
- ◇ IMA actions to advocate for the financial and accounting personnel working in corporations

Presented by Jeffrey C. Thomson

Council Awards Presentation

Tuesday, October 21, 2008

1:30 - 2:45 PM Information Security Risk Management - Why and How to Respond to Cyber Threats

You'll Learn:

- ◇ Electronic Data Security & Maintenance
- ◇ How to manage and mitigate unauthorized use or access
- ◇ How to establish an effective level of internal control over your "E"

Presented by Thomas Grottke and John DeMauro

3:00 - 4:00 PM Identity Theft and Fraud

- ◇ Identity theft through unauthorized computer intrusions
- ◇ Internet fraud schemes
- ◇ How to avoid becoming a victim

Presented by Thomas S. Lawler

Monday and Tuesday, October 20 and 21

Concurrent Track - CMA Review Part 3

You'll Learn:

- ◇ Strategic Planning & Marketing
- ◇ Corporate Finance
- ◇ Decision Analysis & Investment Decision Analysis

Presented by Robb Morton & Tony Kvedar

Mystic, Connecticut Attractions:

Not everything at Mystic Seaport is outdoors. Visit the Planetarium, learn about astronomy and navigation with planetarium programs, classes and workshops that serve all ages and interests. Each season the Planetarium daily program shows you how to locate and identify the stars, planets and constellations in the sky at that time of year.

Discover the historic Ship USS Nautilus and the Submarine Force Museum, the Navy's official submarine museum, which documents the development of submarines. Visitors can tour the Nautilus, the first nuclear-powered submarine and admission is free.

The Mystic Aquarium and Institute for Exploration is a good place to explore the Immersion Institute, home of the Titanic's discoverer, Dr. Robert Ballard. While there enjoy a ride on the XD Motion Theater.

Visit the two largest casinos in the world. Mohegan Sun and Foxwoods Resort Casino. Each offers slot machines, table games restaurants, retail shops and spas for your enjoyment.

Or you can simply enjoy the many shops in Mystic Village. There is something for everyone in Mystic Country!



Overview of CMA Part 3

Presented by Robb Morton and Tony Kvedar

Strategic Management

A. Strategic Planning

(15%) (Level B)

Strategic and tactical planning; manufacturing paradigms such as JIT, MRP, and theory of constraints; value chain analysis; benchmarking; ABM and AMB and continuous improvement.

B. Strategic Marketing

(15%) (Level A)

Strategic role of marketing; market segmentation; managing products and services; pricing strategies; promotional mix and distribution strategy.

C. Corporate Finance (25%) (Level B) Types of risk; measures of risk; portfolio management; options and futures; capital instruments for long-term financing; dividend policy; factors influencing the optimum capital structure; cost of capital; and managing and financing working capital.

D. Decision Analysis (25%) (Level C) Logical steps to reach a decision; relevant data concepts; cost-volume-profit analysis; marginal analysis; cost-based pricing; income tax implications for operational decision analysis.

E. Investment Decision Analysis (20%) (Level C) Cash flow estimates; time value of money; discounted cash flow concepts; net present value; internal rate of return; non-discounting analysis techniques; income tax implications for investment decision analysis; ranking investment projects; risk analysis; real options.

NERC 2008 REGISTRATION FORM

Name: CMA CFM CPA
 (circle as appropriate)

Nickname for Badge:

Title:

Company:

Address:

City, State, Zip:

Telephone:

E-Mail:

IMA Member Number:

IMA Chapter:

Course Fees:	By	By	After
	6/30/2008	8/15/2008	8/15/2008
Full Program	<input type="checkbox"/> \$249	<input type="checkbox"/> \$269	<input type="checkbox"/> \$289
Day One Only	<input type="checkbox"/> \$199	<input type="checkbox"/> \$219	<input type="checkbox"/> \$239
Day Two Only	<input type="checkbox"/> \$199	<input type="checkbox"/> \$219	<input type="checkbox"/> \$239

Register Early and Save ~ Deadline for Hotel is September 28, 2008

Mystic Hilton Hotel Reservations: \$159 per night plus tax 1-860-572-0731

MAKE CHECKS PAYABLE TO IMA-NERC

MAIL OR E-MAIL REGISTRATION FORM AND PAYMENT TO:

IMA - NorthEast Regional Council

c/o Linda M. Simmons

42 Farm Brook Court

Hamden, CT 06514

Phone: 203-988-4903

E-Mail: Linda.Simmons@comcast.net

PAYMENT INFORMATION:

Check enclosed payable to IMA - NERC

VISA Master Card

Card Number _____ / _____
 Expiration Date

Cardholder Name (print)

Authorized Signature

Please check the session you are most likely to attend:
 Note: Attendees may change sessions later; this information is only to assist in the event planning.

Monday, October 20, 2008

- Educational Sessions
- CMA Review - Day One

Tuesday, October 21, 2008

- Educational Sessions
- CMA Review - Day Two

Registration: Sunday, October 19, 2008 6:00 - 7:00 pm

Mohegan Sun Casino Road Trip: Sunday, October 19, 2008 8:00 - 11:00 pm

Hospitality Gathering: Monday, October 20, 2008 7:00 - 10:00 pm



NorthEast Regional Council

Linda M. Simmons

42 Farm Brook Court

Hamden, CT 06514