



ROSTER AND PROGRAM BOOK

2009 / 2010

IMA Waterloo-Cedar Falls Chapter

2009 / 2010

Roster and Program Book

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Message from the Board
2009 / 2010

The Institute of Management Accountants (IMA[®]) is the world's leading organization dedicated to empowering management accounting and finance professionals to drive business performance.

The mission of IMA is to provide a dynamic forum for management accounting and finance professionals to develop and advance their careers through certification, research and practice development, education, networking, and the advocacy of the highest ethical and professional practices.

The Waterloo-Cedar Falls chapter invites you to attend the programs offered. Networking with other professionals as well as continuing your education is vital.

During this coming year it is my hope that we can all work together to make IMA an organization that really is beneficial to each member. I welcome any comments, questions or suggestions that any of you have that will help our organization better meet your needs.

Bonnie Stettler
President 2009-2010
Waterloo-Cedar Falls Chapter

IMA Waterloo-Cedar Falls Chapter

2009 / 2010
Board Members

Bonnie Stettler	bonste@cfu.net	266-9993	President VP Admin Web Master
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Gerald Smith	gerald.smith@uni.edu	273-6345	Director
Randy Thomas	thomasr@uiu.edu	(563) 425-5843	Director

IMA Waterloo - Cedar Falls Chapter

2009 / 2010
Program Schedule

Date	Location	Time	Activity	Topic	Speaker
9/23/2009 Wednesday	Holiday Inn Cedar Falls	5:15 5:45 6:45	Social Dinner Presentation	ISCPA FASB Accounting Standards Codification	Mary Christ UNI
10/20/2009 Tuesday	Highway 63 Diner	5:15 5:45 6:45	Social Dinner Presentation	Students Ethics 2 hours	Lee Nicholas UNI
11/13/2009 Friday	UNI Curris Bldg Rooms 1 & 3	8:00 8:30 11:00 12:00 12:30	Sign in Presentation Presentation Lunch Presentation	Stimulus Bill and Tax Update Developing a Financial Plan & Investment Strategy Financial Plan & Investment Strategy (continued)	Joe Kristan Roth & Company PC Karla Hoppes & Lisa Wall Hogan Capital Management, Inc.
January	UNI Schindler Bldg			ICN TBD	TBD
2/11/2010 Thursday	Hawkeye College Tama Hall	8:00 8:30 9:45 11:00 12:00 12:30	Sign in Presentation Presentation Presentation Lunch Presentation	SHRM HR Code of Conduct Training & Development International Business Etiquette Information Technology Controls Information Technology Controls (continues)	Mark Ryan Hawkeye College Mark Ryan Tami McLaren VGM Pam Brodsack CBE
3/9/2010 Tuesday	Allen Hospital	4:30 5:30 6:30	Tour Buffet Presentation	Allen Hospital Healthcare Update	Jim Waterbury Allen

Hawkeye College, 1501 E. Orange Rd., Waterloo, IA
 Holiday Inn, 5826 University Ave., Cedar Falls, IA
 Hwy 63 Diner, 3030 Marnie Rd, Waterloo, IA
 University of Northern Iowa (UNI), www.uni.edu for directions
 Evening technical meetings meal fee is \$16.00, student meal fee is \$5.00
 4 hour seminar fees are \$30.00 and \$10.00 for students

Reservations should be made to Vince Heuer, 319-273-3527 or vince.heuer@uni.edu

IMA Waterloo-Cedar Falls Chapter
2009 / 2010

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IMA Waterloo-Cedar Falls Chapter

2009 / 2010

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IMA Waterloo-Cedar Falls Chapter
2009 / 2010

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IMA Waterloo-Cedar Falls Chapter
2009 / 2010

CMA Holders

Carolyn Bauer
Michael Boman
Denise Bouska
Lori Brandt
Rodney Brockett
Diane Caley
Randall Costello
Leisha Eaton
Jason Flinn
T. Judy Hahm
Andrea Hansen
John Hawley
Gail Hendricks
Erich Heneke
Mardy Higgins
John Holden
Peilan Johnson
Debra Jungling
Chuchu Liao
Kevin McKinley
Dean McMullen
Jodi Miller
Jean Naber
Lee Nicholas
Michael Ritter
Pamela Roberts
Deborah Vogeler
Steven Warneke
Mark Weak
Jo Weidman

IMA Waterloo-Cedar Falls Chapter

2009 / 2010

Years of Perfect Attendance

ONE YEAR

Rod Brockett
Lynn Miller
Jean Naber
Jeff Sommerfeldt

SIX YEARS

John Adams
Lori Brandt
Leo Campbell

TWO YEARS

Debra Jungling
Trent Olmstead
Bill Schmid
Brandy Wilson

SEVEN YEARS

Lee Nicholas

EIGHT YEARS

Karla Hoppes

THREE YEARS

Al Eiderts
Terri Seegers

NINE YEARS

Robert McGill
Howard Petersen

FOUR YEARS

Denise Bouska
Robert Krogh
Bonnie Stettler

FIFTEEN YEARS

Vince Heuer

FIVE YEARS

Louis Fettkether

FORTY YEARS

John Grabow

IMA Waterloo-Cedar Falls Chapter
2009 / 2010
25er Club Members

John Adams
Robert Bradshaw
Leo Campbell
Daniel Dolan
Al Eilderts
Louis Fettkether
John Grabow
Clem Havlik
Vincent Heuer
Robert Hughes
Joseph Jacoby
Robert Krogh
Robert McGill
Lynn Miller
Paul Morris
Lee Nicholas
Gene ODonald
Howard Peterson
William Schmid
Terri Seegers
Bradford Shatzer

IMA Waterloo-Cedar Falls Chapter
2009 / 2010
Stuart Cameron McLeod Society

Robert Krogh
Lee Nicholas

"The SCMS was formed to recognize those who had served the IMA and to provide an opportunity for continued friendship and service (see History link). Today we continue those traditions, but we also recognize our future rests with our accounting and finance students. So, we use a portion of our dues as well as raise additional funds to offer a significant student scholarship and support the Annual IMA Student Conference." Excerpt from SCMS website <http://scms.imanet.org/>

IMA Waterloo-Cedar Falls Chapter

2009 / 2010

Chapter Competition History

Competition Banners

1973	6 th Place
1974	9 th Place
1988	16 th Place
1991	14 th Place
1992	15 th Place
1993	24 th Place
1994	4 th Place
2000	12 th Place
2001	8 th Place
2006	16 th Place
2007	25 th Place
2009	25 th Place

Membership Achievement Award

1994

If anyone has additional Chapter Competition History information, please pass it along to one of our Board Members.

IMA Waterloo-Cedar Falls Chapter Past Presidents

1946-1947	Howard L. Dexter	The Rath Packing Company
1947-1948	John L. Graflund	Deere and Company, Moline
1948-1949	Harold J. Miller	Alstadt & Langlas Baking Company
1949-1950	G. W. Twogood	The Rath Packing Company
1950-1951	M. E. Salisbury	Deere and Company, Moline
1951-1952	Orlo A. Bush	Waterloo Board of Education
1952-1953	Charles G. White	John Deere Waterloo Tractor Works
1953-1954	C. L. Martin	Hoxie Fruit Company
1954-1955	Richard W. Smith	Burrogught Corporation
1955-1956	Robert L Morris	The National Bank of Waterloo
1956-1957	John E. Cash	The Rath Packing Company
1957-1958	Milton L. Horak	The DX Sunray Oil Company
1958-1959	Edward D. Kadera	Peoples Bank and Trust Company
1959-1960	Kenneth L. Schadle	Kroblin Refrigerate Xpress, Inc. Takin Bros. Freight Line, Inc.
1960-1961	Condon L. Brody	The Rath Packing Company
1961-1962	Carlton W. Holmes, Jr.	Perpetual Savings and Loan Association
1962-1963	Ronald J. Cook	The Rath Packing Company
6/63-12/63	William H. Rippey	National Cash Register Company, Gary, IN
1/64 - 5/64	John O. Marlow	Home Savings and Loan Association
1964-1965	John O. Marlow	Home Savings and Loan Association
1965-1966	Stuart E. Sears	Gates Waterloo Business College
1966-1967	Joseph W. Schneider	John Deere Waterloo Tractor Works
1967-1968	Robert Bradshaw	The Rath Packing Company
1968-1969	Charles E. Meyer	National Cash Register Company
1969-1970	David L. Ryan	General Mortgage Corporation of Iowa
1970-1971	John L. Grabow	Herrick Refrigeration Company
1971-1972	Joseph M. Jacoby	Hinson Division, Royal Industries
1972-1973	Robert McGill	C.W. Shirey Company
1973-1974	Leo Campbell	First Federal Savings and Loan Association
1974-1975	Kenneth D. Alberts	Cedar Falls Utilites
1975-1976	Ronald J. Kettrell	Matt Parrott and Sons Company
1976-1977	Jean K. Kraemer	Kraemer Accounting Service
1977-1978	Henry F. Oltrogge	Banco Mortgage Company
1978-1979	Howard Peterson	Warren Transport, Inc.
1979-1980	Bruce Bilton	Hinson Manufacturing Co.
1980-1981	Paul Martin	City and National Employment

IMA Waterloo-Cedar Falls Chapter
Past Presidents

1981-1982	Karen Sharp	John Deere Foundry
1982-1983	Robert Krogh	John Deere Foundry
1983-1984	Horst Wartenberg	John Deere Engine Works
1984-1985	Vincent Heuer	Vincent Heuer, CPA
1985-1986	John Adams	Heaton, Adams & Co.
1986-1987	Al Eilderts	The Bookkeeping Service Corp.
1987-1988	Duane Lemke	John Deere Foundry
1988-1989	Terri Seegers	John Deere Waterloo Works
1989-1990	Francis Moore	Advanced Systems, Inc.
1990-1991	Gary Wiezorek	John Deere Waterloo Works
1991-1992	Pam Bishop	Bertch Cabinet Mfg.
1992-1993	Lee Nicholas	University of Northern Iowa
1993-1994	Barb Cummins	Bergan, Paulsen & Company, P.C.
1994-1995	Claudia Schroeder	Norwest Bank Iowa, N.A.
1995-1996	Gayle Lundeen	John Deere Product Engineering Center
1996-1997	Delon Gobeli	John Deere Engine Works
1997-1998	Jean Naber	Kidder Benefit Consultants, Inc.
1998-1999	Debra Jungling	Exceptional Persons, Inc.
1999-2000	Karla Hoppes	Homeland Bank N.A.
2000-2001	Lori Brandt	Engineered Products Co.
2001-2002	Denise Bouska	University of Northern Iowa
2002-2003	Denise Bouska	University of Northern Iowa
2003-2004	Jeff Sommerfeldt	Waterloo Community School District
2004-2005	Dallon Christensen	John Deere Waterloo Works
2005-2006	Christine Benham	Jackson's International Auctioneers & Appraisers
2006-2007	Lori Brandt	Engineered Products Co.
2007-2008	Lori Brandt	Engineered Products Co.
2008-2009	Lori Brandt	Engineered Products Co.

NORTH CENTRAL REGIONAL COUNCIL

BOARD POSITION	NAME	EMAIL ADDRESS
President	Kathy Smith	ksmith@shortstopstores.com
V. P. Professional Education	Denise Bouska	dbouska@hawkeyecollege.edu
V. P. Member Services	Robert Shaw	rshaw@mchsi.com
V.P. Communications/Webmaster	Dean O'Regan	dean@erscllc.com
Secretary	Lee McFee	leemcfee@wesfinch.com
Treasurer	Robin Zenz	rzenz@greatriveroms.com

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Regional Council Vice President	Steven Skoog	srs2177@aol.com
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Ethics	Lee Nicholas	leenicholas@mchsi.com
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SCMS Communications Committee Co-Chair	Alan Fletcher	afletche@aegonusa.com

This Chapter List is for official IMA use. Users should refrain from contacting chapter officers for solicitation and sales purposes. Individual IMA members and potential members may initiate contact with the chapter officers for organization information and networking purposes. Use of this information for any other purposes, including, but not limited to, reproducing and storing in a retrieval system by any means electronic or mechanical, photocopying or using the names, addresses, and phone numbers for any private, commercial or political mailing is strictly prohibited.

NORTH CENTRAL REGIONAL COUNCIL

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Dubuque Tri-State	Riley Schuster	rschuster@htlf.com
Waterloo / Cedar Falls	Bonnie Stettler	bonste@cfu.net

Web sites of interest:

IMA National	www.imanet.org
North Central Regional Council	www.northcentral.imanet.org
Cedar Rapids	www.cedarrapids.imanet.org
Des Moines	www.desmoines.imanet.org
Dubuque Tri-State	www.dubuque.imanet.org
Waterloo / Cedar Falls	www.imawcf.imanet.org

NORTH CENTRAL REGIONAL COUNCIL

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Web sites of interest:

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Waterloo / Cedar Falls	www.imawcf.imanet.org

IMA STATEMENT OF ETHICAL PROFESSIONAL PRACTICE

Members of IMA shall behave ethically. A commitment to ethical professional practice includes: overarching principles that express our values, and standards that guide our conduct.

PRINCIPLES

IMA's overarching ethical principles include: Honesty, Fairness, Objectivity, and Responsibility. Members shall act in accordance with these principles and shall encourage others within their organizations to adhere to them.

STANDARDS

A member's failure to comply with the following standards may result in disciplinary action.

I. COMPETENCE

Each member has a responsibility to:

1. Maintain an appropriate level of professional expertise by continually developing knowledge and skills.
2. Perform professional duties in accordance with relevant laws, regulations, and technical standards.
3. Provide decision support information and recommendations that are accurate, clear, concise, and timely.
4. Recognize and communicate professional limitations or other constraints that would preclude responsible judgment or successful performance of an activity.

II. CONFIDENTIALITY

Each member has a responsibility to:

1. Keep information confidential except when disclosure is authorized or legally required.
2. Inform all relevant parties regarding appropriate use of confidential information. Monitor subordinates' activities to ensure compliance.
3. Refrain from using confidential information for unethical or illegal advantage.

III. INTEGRITY

Each member has a responsibility to:

1. Mitigate actual conflicts of interest. Regularly communicate with business associates to avoid apparent conflicts of interest. Advise all parties of any potential conflicts.
2. Refrain from engaging in any conduct that would prejudice carrying out duties ethically.
3. Abstain from engaging in or supporting any activity that might discredit the profession.

IV. CREDIBILITY

Each member has a responsibility to:

1. Communicate information fairly and objectively.
2. Disclose all relevant information that could reasonably be expected to influence an intended user's understanding of the reports, analyses, or recommendations.
3. Disclose delays or deficiencies in information, timeliness, processing, or internal controls in conformance with organization policy and/or applicable law.

RESOLUTION OF ETHICAL CONFLICT

In applying the Standards of Ethical Professional Practice, you may encounter problems identifying unethical behavior or resolving an ethical conflict. When faced with ethical issues, you should follow your organization's established policies on the resolution of such conflict. If these policies do not resolve the ethical conflict, you should consider the following courses of action:

1. Discuss the issue with your immediate supervisor except when it appears that the supervisor is involved. In that case, present the issue to the next level. If you cannot achieve a satisfactory resolution, submit the issue to the next management level. If your 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 your superior's knowledge, assuming he or she is not involved. Communication of such problems to authorities or individuals not employed or engaged by the organization is not considered appropriate, unless you believe there is a clear violation of the law.
2. Clarify relevant ethical issues by initiating a confidential discussion with an IMA Ethics Counselor or other impartial advisor to obtain a better understanding of possible courses of action.
3. Consult your own attorney as to legal obligations and rights concerning the ethical conflict.