



Waterloo-
Cedar Falls
Chapter

ROSTER AND PROGRAM BOOK

2010 / 2011

IMA Waterloo-Cedar Falls Chapter

2010 / 2011

Roster and Program Book

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Message from the President

2010 / 2011

Congratulations to Bonnie Stettler, 2009-10 Chapter President, and last year's Board on the 12th place banner!!

My personal involvement with the Waterloo-Cedar Falls Chapter began 20 years ago, August 1990. With Lee Nicholas's encouragement, I had just taken and passed the CMA exam, so membership in the "Institute of Management Accountants" was required.

Little did I realize all the benefits I would reap from becoming an active member of this organization:

- Learning at hundreds of hours of relevant CPE sessions
- Touring local businesses
- Developing leadership skills as President of the Chapter
- Networking while finding presenters for our technical sessions
- Networking as a Regional Council Member and while
- Eating delicious food
- Enjoying spirited discussions on various topics
- Volunteering for My Waterloo Days and United Way
- Last, but certainly best are the friends I've made over the last two decades

I appreciate the opportunity to be your Chapter President for 2010-11. My wish is that you become active in our chapter and gain even a portion of all the awesome things that happened to me as a member of the Waterloo-Cedar Falls Chapter of IMA.

Denise Bouska
President 2010-11

IMA Waterloo-Cedar Falls Chapter

2010 / 2011 Board Members

Denise Bouska	dbouska@hawkeyecollege.edu	296-4275	President Regional Council
Lori Brandt	lbrandt@filterminder.com	234-0231 X-15	VP Admin Program Book Regional Council
Rod Brockett	rodb@petersoncontractors.com	345-2713 x235	Web Master
Eric Brodahl	ericbrodahl@vgm.com	874-7992	Director
Clem Havlik	chavlik@poscorp.com	266-2087	Director
Vince Heuer	vince.heuer@uni.edu	273-3527	Meetings
Karla Hoppes	karla@heatonadams.com	232-1943	Secretary
Deb Jungling	deb.jungling@episervice.org	232-6671	VP Membership Email Tree Employment Community – Service
Lee Nicholas	leenicholas@mchsi.com	287-3997	VP Prof. Education Regional Council National Ethics Committee
Gerald Smith	gerald.smith@uni.edu	273-6345	Director
Bonnie Stettler	bonste@cfu.net	266-9993	VP Communication Newsletter
Randy Thomas	thomasr@uiu.edu	(563) 425-5843	Director
Brandy Wilson	brandy.wilson@vgm.com	274-4442	Treasurer

IMA Waterloo - Cedar Falls Chapter

2010 / 2011
Program Schedule

Date	Location	Time	Activity	Topic	Speaker	Cost
9/21/2010 Tuesday	Holiday Inn Cedar Falls	5:15 5:45 6:45	Social Dinner Presentation	A Purple Nation	Dr. Jeff Stein Wartburg College	\$16.00
10/19/2010 Tuesday	McLeod Center UNI	5:15 5:45 6:45	Social Dinner Presentation	Student Topic	Ben Jacobsen UNI	\$25.00 \$5.00 Students
12/3/2010 Friday	Hawkeye College Tama Hall	8:00 8:30	Sign in Presentation	8 hours Stimulus Bill and Tax Update	Joe Kristan Roth & Company PC	\$50.00
		10:30	Presentation	Tax Implications for Small Business Strategy	Steve Duggan Hogan - Hansen, PC	
		11:30	Lunch			
		12:00	Presentations	Health Insurance Update and Q&A with panel of speakers	Rick Miller, Maria Dreesse Group Benefits Design Dr. Laval Peloquin Allen Occupational Health Services Mark Wall Wheaton Franciscan Healthcare	
January	Schindler Bldg ? UNI	2 hours	ICN	TBD	TBD	Free Pizza
3/9/2011 Wednesday	VGM	8:00 8:30	Sign in Presentation	6 hours Strategic Planning	Dallon Christensen First Step Concepts	\$50.00
		10:30	Presentation	County Tax Update	TBD New County Treasurer or Auditor	
		11:30	Lunch			
		12:30	Presentation	Effective Business Networking	Kory May	
		1:30	Presentation	Ethics	Matt Whitaker	
4/20/2011 Wednesday	Ramada Hotel	4:00 5:30 6:30	Tour Dinner Presentation	NABL @ Tech Works About Tech Works	TBD NABL	\$16.00

Hawkeye College, 1501 E. Orange Rd., Waterloo, IA
 Holiday Inn, 5826 University Ave., Cedar Falls, IA
 VGM & Associates, 1111 W. San Marnan Dr., Waterloo, IA
 Ramada Hotel, 200 W. 4th Str., Waterloo, IA

Meeting dates and times are subject to change. Please check our website for current information at www.imawcf.imanet.org

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

2010 / 2011 ROSTER

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2010 / 2011 ROSTER

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Gerald Smith , CPA
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College Of Business Administration
Cedar Falls, IA 50614-0127

2010 / 2011 ROSTER

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Beirut,
Lebanon

IMA Waterloo-Cedar Falls Chapter
2010 / 2011

CMA Holders

Carolyn Bauer
Michael Boman
Denise Bouska
Lori Brandt
Rodney Brockett
Diane Caley
Randall Costello
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
Jodi Miller
Jean Naber
Lee Nicholas
Michael Ritter
Pamela Roberts
Hollis Skaife
Deborah Vogeler
Steven Warneke
Mark Weak
Jo Weidman

IMA Waterloo-Cedar Falls Chapter

2010 / 2011

Years of Perfect Attendance

ONE YEAR

Lynn Miller
Jean Naber
Jeff Sommerfeldt

TWO YEARS

Rod Brockett
Trent Olmstead
Bill Schmid

THREE YEARS

Al Eiderts
Deb Jungling
Terri Seegers
Brandy Wilson

FOUR YEARS

Robert Krogh

FIVE YEARS

Denise Bouska
Louis Fettkether
Bonnie Stettler

SIX YEARS

John Adams
Leo Campbell

SEVEN YEARS

Lori Brandt
Lee Nicholas

EIGHT YEARS

Karla Hoppes

NINE YEARS

Robert McGill
Howard Peterson

SIXTEEN YEARS

Vince Heuer

FORTY YEARS

John Grabow

IMA Waterloo-Cedar Falls Chapter
2010 / 2011
25 Year Club Members

John Adams
Robert Bradshaw
Al Eilderts
Louis Fettkether
John Grabow
Clem Havlik
Vincent Heuer
Robert Hughes
Robert Krogh
Matthew McGough
Lynn Miller
Paul Morris
Lee Nicholas
Howard Peterson
William Schmid
Terri Seegers
Bradford Shatzer

IMA Waterloo-Cedar Falls Chapter
2010 / 2011
50 Year Club Members

Leo Campbell
Joseph Jacoby
Robert McGill

IMA Waterloo-Cedar Falls Chapter
2010 / 2011
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

2010 / 2011

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
2010	12 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.
2009-2010	Bonnie Stettler	Hawkeye Community College

NORTH CENTRAL REGIONAL COUNCIL

BOARD POSITION	NAME	EMAIL ADDRESS
President	Kathy Smith	kasmith1870@aol.com
V. P. Professional Education	Denise Bouska Lori Brandt	dbouska@hawkeyecollege.edu lbrandt@filterminder.com
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

National Board and Committee Members

Regional Council Vice President	Steven Skoog	srs2177@aol.com
At-Large Director	Rachel Murphy	rmurphy@aegonusa.com
Member External Relations Committee	Steven Skoog	srs2177@aol.com
Performance Oversight and Audit Committee	Rachel Murphy	rmurphy@aegonusa.com
Ethics	Lee Nicholas	leenicholas@mchsi.com
Ethics	Bob Krogh	kroghrobertc@johndeere.com
SCMS Board of Governors	Greg Van Gorp	gvangorp@aegonusa.com
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	Tricia Kueter	trowe@dubuquebank.com
Waterloo / Cedar Falls	Denise Bouska	dbouska@hawkeyecollege.edu
Illowa (Mid American Council)	Dallon Christensen	

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

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.