



Waterloo-  
Cedar Falls  
Chapter

# **ROSTER AND PROGRAM BOOK**

**2011 / 2012**

# IMA Waterloo-Cedar Falls Chapter

2011 / 2012

## Roster and Program Book

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## Message from the President

2011-2012

Congratulations to Denise Bouska, 2010-2011 Chapter President, who did an exceptional job of leading our Chapter. Under her outstanding leadership, last year's Board facilitated our Chapter placing 18<sup>th</sup> out of 98 chapters in the IMA Warren Division (small group). Thanks to Denise and the Board for their commitment and hard work on behalf of the Waterloo-Cedar Falls Chapter.

Welcome to the 2011-2012 year for the Waterloo-Cedar Falls Chapter of the Institute of Management Accountants. Your Roster and Program Book provide a wealth of information designed to enhance your enthusiasm for and involvement in our Chapter activities and thereby maximize the benefits of membership.

The Board worked diligently throughout the summer to plan a Program Schedule that offers meaningful CPE opportunities in pleasant and interesting venues. Please review these opportunities and calendar protect the ones you plan to attend.

Also, please consider inviting one of your professional colleagues to join you for Student Night on September 7 at our kick-off meeting where David Vaudt will be speaking on "Iowa Fraud Audits" and then, after dinner, on the current Iowa budget. David is an outstanding speaker; I believe those who hear him will appreciate his knowledge and experience.

Thank you for the opportunity to serve as your 2011-2012 President. Your ideas and feedback are always welcome. Your active participation will strengthen the Waterloo-Cedar Falls Chapter!

Gerald Smith  
2011-2012 President

# IMA Waterloo-Cedar Falls Chapter

## 2011 / 2012 Board Members

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

IMA Waterloo - Cedar Falls Chapter

2011 / 2012  
Program Schedule

Date	Location	Time	CPE	Topic	Speaker	Cost
9/7/2011 Wednesday	CEEE - UNI Cedar Falls	4:00 Presentation 5:00 Dinner 6:00 Presentation (RSVP by 8/29/11 for parking passes)	2 hours	State of IA Fraud Audits State of IA Budget	David Vaudt, IA State Auditor	\$16.00 Students Free
11/10/2011 Thursday	Ramada Inn Waterloo	8:30 9:30 Sign in 10:00 Presentation  12:00 Lunch  1:00 Presentation  3:00 Presentation  4:10 Presentation 5:30 Dinner (add website link)	6 hours	Invite Regional Council for Meeting Tax Update  Ethics  Diverse Business affect on Accounting  Galleria De Paco - Business Start Up	Joe Kristan Roth & Company PC  TBD UNI  Eric Brohadl VGM	\$75.00 \$15.00 Students
1/5/2012 Thursday	Schindler Bldg UNI	TBD ICN	2 hours	Virtual Office	Dallon Christiansen First Step Concepts	Free Pizza
2/21/2012 Tuesday	Ferrari's Ristorante Cedar Falls	5:00 Presentation 6:00 Dinner 7:00 Presentation	2 hours	Managing a Multigenerational Workforce Managing Through Change (Invite SHRM \$24.40 for meal collected by SHRM)	R J Hammel Robert Half	\$20.00 \$5.00 Students
4/17/2012 Tuesday	the Isle Waterloo	8:30 Sign in 9:00 Presentation  10:30 Presentation  12:00 Lunch  1:00 Presentation  2:30 Presentation  4:00 Tour	6 hours	IA Dept Econ Devel. Privatization New Jobs Training Credit  Slot Accounting & Controls  Casino Revenue Community Assistance  White Collar Crime  Driver's license needed as identification for tour	Sherry Timmins & Leanna Gerald Iowa Department of Economic Development  Meagan Miller and Bari Richter the Isle  Beth Knipp Black Hawk Gaming Commission  Randy VanGent FBI	\$50.00 \$15.00 Students

Ferrari's Ristorante, 1521 Technology Parkway, Cedar Falls, IA  
 the Isle, 777 Isle of Capri Blvd, Waterloo, IA  
 Ramada Hotel, 200 W. 4th Str., Waterloo, IA  
 UNI, CEEE Auditorium, south of University Ave. @ Campus St.(second parking lot on right)

Meeting dates and times are subject to change. Please check our website for current information at [www.imawcf.imanet.org](http://www.imawcf.imanet.org)

Reservations should be made to Vince Heuer, 319-273-3527 or [vince.heuer@uni.edu](mailto:vince.heuer@uni.edu)

IMA Waterloo-Cedar Falls Chapter  
2011 / 2012 Roster

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2011 / 2012 Roster

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IMA Waterloo-Cedar Falls Chapter  
2011 / 2012

CMA Holders

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Lori Brandt  
Rodney Brockett  
Diane Caley  
Randall Costello  
Jason Flinn  
T. Judy Hahm  
Andrea Hansen  
John Hawley  
Erich Heneke  
John Holden  
Peilan Johnson  
Debra Jungling  
Chuchu Liao  
Kevin McKinley  
Jodi Miller  
Jean Naber  
Lee Nicholas  
Carolyn Niemantsverdriet  
Michael Ritter  
Pamela Roberts  
Hollis Skaife  
Deborah Vogeler  
Steven Warneke  
Mark Weak  
Jo Weidman

# IMA Waterloo-Cedar Falls Chapter

2011 / 2012

## Years of Perfect Attendance

### ONE YEAR

Lynn Miller  
Jean Naber  
Jeff Sommerfeldt

### TWO YEARS

Trent Olmstead  
Bill Schmid

### THREE YEARS

Rod Brockett  
Al Eiderts  
Deb Jungling  
Terri Seegers  
Brandy Wilson

### FOUR YEARS

Robert Krogh

### FIVE YEARS

Louis Fettkether  
Bonnie Stettler

### SIX YEARS

John Adams  
Denise Bouska  
Leo Campbell

### SEVEN YEARS

Lee Nicholas

### EIGHT YEARS

Lori Brandt  
Karla Hoppes

### NINE YEARS

Robert McGill  
Howard Peterson

### SEVENTEEN YEARS

Vince Heuer

### FORTY YEARS

John Grabow

IMA Waterloo-Cedar Falls Chapter  
2011 / 2012  
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  
2011 / 2012  
50 Year Club Members

Leo Campbell  
Joseph Jacoby  
Robert McGill

IMA Waterloo-Cedar Falls Chapter  
2011 / 2012  
Stuart Cameron McLeod Society (SCMS)  
or Society for Continuing Member Service

Robert Krogh  
Lee Nicholas

“The Stuart Cameron McLeod Society (SCMS) was founded in 1934 to recognize those who served IMA and to provide an opportunity for continued friendship, fellowship, and service. Today, SCMS, also known as the Society for Continuing Member Service, continues those traditions and meets the challenges of tomorrow by funding student scholarships, supporting the Annual IMA Student Conference, and offering educational and social events for its members.” Excerpt from SCMS website  
<http://scms.imanet.org/>

# IMA Waterloo-Cedar Falls Chapter

2011 / 2012

## Chapter Competition History

### Competition Banners

1973	6 <sup>th</sup> Place
1974	9 <sup>th</sup> Place
1988	16 <sup>th</sup> Place
1991	14 <sup>th</sup> Place
1992	15 <sup>th</sup> Place
1993	24 <sup>th</sup> Place
1994	4 <sup>th</sup> Place
2000	12 <sup>th</sup> Place
2001	8 <sup>th</sup> Place
2006	16 <sup>th</sup> Place
2007	25 <sup>th</sup> Place
2009	25 <sup>th</sup> Place
2010	12 <sup>th</sup> Place
2011	18 <sup>th</sup> Place

### Membership Achievement Award

1994

### Membership Retention Award

2010

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
2010-2011	Denise Bouska	Hawkeye Community College

## NORTH CENTRAL REGIONAL COUNCIL

<b>BOARD POSITION</b>	<b>NAME</b>	<b>EMAIL ADDRESS</b>
<b>President</b>	Jane Karli	<a href="mailto:jkarli57@hotmail.com">jkarli57@hotmail.com</a>
<b>V. P. Professional Education</b>	Denise Bouska Lori Brandt	<a href="mailto:dbouska@hawkeyecollege.edu">dbouska@hawkeyecollege.edu</a> <a href="mailto:lbrandt@filterminder.com">lbrandt@filterminder.com</a>
<b>V. P. Member Services</b>	Elizabeth Davis	<a href="mailto:edavis@daviscpasolutins.com">edavis@daviscpasolutins.com</a>
<b>V.P. Communications/Webmaster</b>	Dean O'Regan	<a href="mailto:dean@erscllc.com">dean@erscllc.com</a>
<b>Secretary</b>	Lee McFee	<a href="mailto:leemcfee@wesfinch.com">leemcfee@wesfinch.com</a>
<b>Treasurer</b>	Rachel Murphy	<a href="mailto:rmurphy@fmtcs.com">rmurphy@fmtcs.com</a>
<b>National Board and Committee Members</b>		
<b>Regional Council Vice President</b>	Steven Skoog	<a href="mailto:srs2177@aol.com">srs2177@aol.com</a>
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<b>SCMS Board of Governors</b>	Kathy Smith	<a href="mailto:Kathy@Strokedetectionplus.com">Kathy@Strokedetectionplus.com</a>

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	Sandra Wild	
Waterloo / Cedar Falls	Gerald Smith	<a href="mailto:gerald.smith@uni.edu">gerald.smith@uni.edu</a>

### **Web sites of interest:**

IMA Headquarters	<a href="http://www.imanet.org">www.imanet.org</a>
North Central Regional Council	<a href="http://www.northcentral.imanet.org">www.northcentral.imanet.org</a>
Cedar Rapids	<a href="http://www.cedarrapids.imanet.org">www.cedarrapids.imanet.org</a>
Des Moines	<a href="http://www.desmoines.imanet.org">www.desmoines.imanet.org</a>
Dubuque Tri-State	<a href="http://www.dubuque.imanet.org">www.dubuque.imanet.org</a>
Waterloo / Cedar Falls	<a href="http://www.imawcf.imanet.org">www.imawcf.imanet.org</a>

## **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.

# IMA Waterloo-Cedar Falls Chapter

2011 / 2012

## Membership Information

### Member Fees

Regular	\$195	Academic	\$98
International	\$195	Retired	\$98
Associate Year 1	\$65	ELM	\$49
Associate Year 2	\$130	Student	\$39
Young Professional	\$130		

### Exam Fees

Exam fee	\$350
Exam fee for 2 parts at once	\$300/ea
Faculty/Student exam fee (Canada, Mexico and U.S.)	\$175
Faculty/Student exam fee for 2 parts at once	\$125/ea
Transition fee	\$225
Certification entrance fee	\$200
Faculty/Student Certification entrance fee	\$75

Please visit IMA's website for Membership sign-up and Certification details:

[www.imanet.org](http://www.imanet.org)