



Waterloo-
Cedar Falls
Chapter

ROSTER AND PROGRAM BOOK

May 1, 2012 – April 30, 2013

IMA Waterloo-Cedar Falls Chapter

2012 / 2013

Roster and Program Book

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Message from the President

2012-2013

Congratulations go out to our Chapter for last year's 9th place finish in IMA's Warren Division. Each year we compete for "points" awarded for doing things that make a chapter great. Our competition consists of 100 other small-sized chapters worldwide. It was a huge honor for me to attend the June 2012 IMA National Convention in Las Vegas and proudly accept our award.

As I take over the "steering wheel" from our 2011-12 Chapter President Gerald Smith I pray that we continue to provide an organization that makes you the members both thrilled about what you receive and proud to be an IMA member.

As my first official act I welcome you to the 2012-2013 year of our Waterloo-Cedar Falls IMA Chapter. I encourage you to review this year's Roster and Program Book, and begin to "pencil in" all the events that you will attend. Our Planning Committee has scheduled a year of activities that we hope will: entertain you, accomplish your CPE needs, provide networking and fellowship, offer you some great meals, and help you see that it is fun to hang with a bunch of Accountants!

Also, let's not keep our IMA Chapter a secret. Invite your colleagues to visit a meeting -- that's how I got started 25 years ago. Remember, this is YOUR Chapter and it is your participation that will continue to make Waterloo-Cedar Falls a "Top Ten" Chapter!

Randy Thomas
2012-2013 President

IMA Waterloo-Cedar Falls Chapter

2012 / 2013
Board Members

Randy Thomas	thomasr@uiu.edu	(563) 425-5843	President
Gerald Smith	gerald.smith@uni.edu	273-6345	Past President
Denise Bouska	denise.bouska@hawkeyecollege.edu	296-4275	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
Vince Heuer	heuerell@mchsi.com	233-9128	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
Laurie Watje	laurie.watje@uni.edu	273-2020	Newsletter
Brandy Wilson	brandy.wilson@vgm.com	274-4442	Treasurer

IMA – Waterloo-Cedar Falls Chapter Program Schedule for 2012-13

<u>Date</u>	<u>Session Time</u>	<u>Description</u>	<u>Presenter</u>	<u>Cost</u>
September				
Tues, 11 Sep 2012	1	4:30 – 5:30 Ethics	Nicholas, Lee	\$20.00
4:30 to 7:30PM		5:30 – 6:30		Students Free
Location – Ferrari's	1	6:30 – 7:30 Ethics	Thomas, Randy	
October				
Wed, 10 Oct 2012	1	4:30 – 5:30 Medical Funding	Chris Sparks	\$20.00
4:30 to 7:30PM		5:30 – 6:30	Deb Jungling	Students Free
Location – Ferrari's	1	6:30 – 7:30 Medicaid Redesign		
Fall Conference				
	8:30 check-in, 9AM start			\$50.00
08 Nov 2012	6.5	Institute for Decision Making	LaDean Bowen	Students Free
8:30 to 4:00		IA Center for Immigrant Leadership & Integration	Dr. Mark Grey	
Location – UNI Business and Community Services Building		Entrepreneurship Technical Assistance	Rob Williams	
Room 30		SBDC	Dan Beenken	
		IA Waste Reduction Center	Dan Nickey	
		Strategic Marketing Services	Ron Padovich	
		JPEC	Katherine Cota-Uyar	
		Tour	Laurie Watje	
January ICN				
Thur, 10 Jan 2013	2	Tax Update	Joe Kristan	Free Pizza
6:00 to 8:30 PM				
Location – UNI Education Center				
Spring Conference				
	8:30 check-in, 9AM start			\$50.00
Wed, 20 or 27 Feb 2013	2	Operations of a Private University	Don Aungst, CFO UIU	Students Free
8:30 to 5:00	2	TBD		
Location – Hawkeye CC	2	TBD		
	2	Bond refinancing	Gary Shontz	
March				
Wed, 27 Mar 2013	1	4:30 – 5:30 Walking Tour from Jamison's	David Deeds	\$20.00
4:30 to 7:30 PM		5:30 – 6:30 Dinner @ CU Restaurant		Students Free
Location – Jameson's & CU	1	6:30 – 7:30 Revitalization of Downtown Waterloo		

Ferrari's Ristorante, 1521 Technology Parkway, Cedar Falls, IA
UNI, CEEE Auditorium, south of University Ave. @ Campus St.(second parking lot on right)
Hawkeye College, 1501 E. Orange Rd., Waterloo, IA
Jameson's 310 E. 4th St., Waterloo, IA and CU restaurant 320 E. 4th St.

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

Reservations should be made to Vince Heuer, 319-233-9128 or heuerell@mchsi.com or Deb Jungling deb.jungling@episervice.org

IMA Waterloo-Cedar Falls Chapter

2012 / 2013

John Adams
Heaton Adams Co
PO Box 1026
Waterloo, IA 50704-1026

Danielle Albright
Community United Child Care Centers
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Denise Bouska, CMA, CPA
4200 E Dunkerton Rd
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Robert Bradshaw
3720 Village Pl Apt 6207
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Engineered Products Co
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Rodney Brockett, CMA, CPA
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Leo Campbell
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Cedar Falls, IA 50613-6146

Lucy Choplin, CPA
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Randall Costello, CMA, CPA
Iowa Insurance Seminar
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IMA Waterloo-Cedar Falls Chapter
2012 / 2013

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IMA Waterloo-Cedar Falls Chapter
2012 / 2013

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Howard Peterson
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IMA Waterloo-Cedar Falls Chapter
2012 / 2013

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Wm Kenneth Ruddy, CPA
4746 Edgebrook Dr
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John Deere Waterloo Works
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Bradford Shatzer
Veridian Credit Union
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Waterloo, IA 50701-3629

Gary Shontz
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Cedar Falls, IA 50613-8312

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2218 W Lawn Ave
Madison, WI 53711-1952

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Univ Of Northern IA
College Of Business Admin
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Waterloo Comm School District
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Bonnie Stettler, CPA
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Cedar Falls, IA 50613-1541

IMA Waterloo-Cedar Falls Chapter
2012 / 2013

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Upper Iowa University
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IMA Waterloo-Cedar Falls Chapter
2012 / 2013

CMA Holders

Denise Bouska
Lori Brandt
Rodney Brockett
Diane Caley
Randall Costello
Clinton Farlinger
Jason Flinn
T. Judy Hahm
Andrea Hansen
John Hawley
Erich Heneke
Valerie Hennings
John Holden
Peilan Johnson
Debra Jungling
Chuchu Liao
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

2012 / 2013

Years of Perfect Attendance

ONE YEAR

Lynn Miller
Jean Naber
Janice Rogers
Gary Shontz
Gerald Smith
Jeff Sommerfeldt

TWO YEARS

Trent Olmstead
Bill Schmid

THREE YEARS

Al Eiderts
Deb Jungling
Terri Seegers
Brandy Wilson

FOUR YEARS

Rod Brockett
Robert Krogh

FIVE YEARS

Louis Fettkether
Bonnie Stettler

SIX YEARS

John Adams
Denise Bouska
Leo Campbell

EIGHT YEARS

Karla Hoppes
Lee Nicholas

NINE YEARS

Lori Brandt
Howard Peterson

EIGHTEEN YEARS

Vince Heuer

FORTY YEARS

John Grabow

IMA Waterloo-Cedar Falls Chapter
2012 / 2013
25 Year Club Members

John Adams
Al Eilderts
Louis Fettkether
Vincent Heuer
Robert Hughes
Robert Krogh
Matthew McGough
Lynn Miller
Paul Morris
Lee Nicholas
William Schmid
Terri Seegers
Bradford Shatzer
Randall Thomas
Deborah Vogeler
Steven Warneke
Mark Weak

IMA Waterloo-Cedar Falls Chapter
2012 / 2013
50 Year Club Members

Robert Bradshaw
Leo Campbell
John Grabow
Howard Peterson

IMA Waterloo-Cedar Falls Chapter
2012 / 2013

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

2012 / 2013

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
2011	18 th Place
2012	9 th 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
2011-2012	Gerald Smith	University of Northern Iowa

NORTH CENTRAL REGIONAL COUNCIL

BOARD POSITION	NAME	EMAIL ADDRESS
President	Jane Karli	jkarli57@hotmail.com
Secretary	Lee McFee	leemcfee@wesfinch.com
Treasurer	Rachel Murphy	rmurphy@fmtcs.com
V. P. Professional Education	Denise Bouska	denise.bouska@hawkeyecollege.edu
Webmaster	Kathy Smith	Kathy@Strokedetectionplus.com

National Board and Committee Members

Regional Council Vice President	Steven Skoog	srs2177@aol.com
Ethics	Lee Nicholas	leenicholas@mchsi.com
Governance Committee	Jane Karli	jkarli57@hotmail.com
SCMS Board of Governors	Kathy Smith	Kathy@Strokedetectionplus.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

Chapter	President	Email Address
Cedar Rapids	Angela Dockter	adockter@aegonusa.com
Des Moines	Kathy Smith	ksmith4dlord@gmail.com
Dubuque Tri-State	Melinda Uhlenhake	muhlenhake@octhomaslaw.com
Waterloo / Cedar Falls	Randy Thomas	thomasr@uiu.edu

Web sites of interest:

IMA Headquarters	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.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.

IMA Waterloo-Cedar Falls Chapter

2012 / 2013

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		

“The CMA is unique among professional and academic credentials, designed specifically for accounting and financial management professionals in business.

Achieving the CMA demonstrates your professional expertise in financial planning, analysis, control, decision support, and professional ethics – essential skills sought after by successful organizations and their financial team leaders.

Whether you want to enhance your value within your current organization—or expand your career potential—the CMA is the key to maximizing your professional potential.” from imanet.org website

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