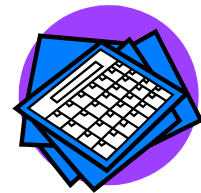




Waterloo-  
Cedar Falls  
Chapter

## **ROSTER AND PROGRAM BOOK**

**May 1, 2014 – April 30, 2015**



**(This page intentionally blank)**

# **IMA Waterloo-Cedar Falls Chapter**

**2014 / 2015**

## **Roster and Program Book**

*Table of Contents*

Message from the President

Chapter Board Members

Technical Meetings

Member Roster

### **About our Members & Chapter**

CMA Members

25 Year Members / 50 Year Members

Stuart Cameron McLeod Society Members

Competition History

Past Presidents

### **About IMA**

IMA Statement of Ethical Professional Practice

IMA Core Values Compliance For All Volunteers

IMA membership information / CMA Credential information

Message from the President  
2014-2015

As I begin my first term as president I am thankful for all the effort that our members have put forth over the past 69 years to ensure the continuity of our Waterloo-Cedar Falls IMA Chapter. The planning committee has been hard at work this summer and I encourage you to review this year's Roster and Program Book and make note of the dates of the 2014-15 meetings. The topics are varied and hand-tailored to the interests of our members and will provide the opportunity to potentially earn 20 hours of continuing education. Please encourage other accounting professionals that you know to make 2014-15 the year that they join our chapter. What impressed me most after my first meeting during 2007-08 was the evidence of the members actively engaging and embracing IMA's five global core values. I encourage all of our members to continue to be cognizant of these values as we enter into this next year, the five values being:

*Respect for the individual* – to treat all members with respect and dignity, valuing individual and cultural differences. Creating an environment that respects all in an atmosphere of open communication, growth and learning.

*Passion for serving members* - enabling individuals to use their capabilities to the fullest to deliver exemplary products and services to members. That enablement extends to being passionate advocates in advancing our global profession. We care for all members and each other--building enduring relationships--and driving continuous improvement.

*High standards of integrity and trust* - We understand and abide by the IMA Statement of Ethical Professional Practice in our everyday actions. Our personal conduct ensures that the IMA name is always worthy of trust--our members around the globe deserve nothing less. We treat each other fairly, keep our promises, make decisions objectively, take responsibility for our actions, and admit our mistakes. We maintain confidentiality as appropriate.

*Innovation and continuous improvement* - We believe innovation and a spirit of continuous improvement are engines that keep us relevant, vital, and growing. Our culture embraces creativity and seeks different perspectives. We behave like owners of a "business," managing risks and identifying new opportunities in serving members and advancing the profession.

*Teaming to achieve* - We encourage and reward both individual and team achievements, proactively working across organizational boundaries to always "remember the member." Our spirit of team achievement extends to advancing our profession and to being responsible and caring partners within our various communities.

As members of the Waterloo-Cedar Falls IMA Chapter, let's continue in this spirit and work together towards making 2014-15 a banner year!

Laurie Watje  
2014-2015 President

# IMA Waterloo-Cedar Falls Chapter

## 2014 / 2015 Board Members

Laurie Watje	<a href="mailto:laurie.watje@uni.edu">laurie.watje@uni.edu</a>	273-2020	President
Denise Bouska	<a href="mailto:drbouska@gmail.com">drbouska@gmail.com</a>	235-2667	Secretary Regional Council
Lori Brandt	<a href="mailto:lbrandt@filterminder.com">lbrandt@filterminder.com</a>	234-0231 X-15	VP Admin Program Book
Rod Brockett	<a href="mailto:rodb@petersoncontractors.com">rodb@petersoncontractors.com</a>	345-2713 x235	Web Master
Vince Heuer	<a href="mailto:heuerell@mchsi.com">heuerell@mchsi.com</a>	233-9128	Meetings
Karla Hoppes	<a href="mailto:karla@cedarvalleywealth.com">karla@cedarvalleywealth.com</a>	266-6507	Director
Deb Jungling	<a href="mailto:deb.jungling@episervice.org">deb.jungling@episervice.org</a>	232-6671	VP Membership Email Tree Employment Community Service
Eric Lee	<a href="mailto:eric.lee@uni.edu">eric.lee@uni.edu</a>	273-2402	Director
Lee Nicholas	<a href="mailto:leenicholas@mchsi.com">leenicholas@mchsi.com</a>	287-3997	CMA Director Regional Council Ethics Committee
Gary Shontz	<a href="mailto:gary.shontz@uni.edu">gary.shontz@uni.edu</a>	273-2000	Director
Gerald Smith	<a href="mailto:gerald.smith@uni.edu">gerald.smith@uni.edu</a>	273-6345	VP Professional Education
Pam Taylor	<a href="mailto:ptaylor@taylorvet.com">ptaylor@taylorvet.com</a>	269-6101	Director
Randy Thomas	<a href="mailto:thomasr@uiu.edu">thomasr@uiu.edu</a>	(563) 425-5843	VP Communications Newsletter
Brandy Wilson	<a href="mailto:brandy.wilson@vgm.com">brandy.wilson@vgm.com</a>	274-4442	Treasurer

## IMA – Waterloo Cedar Falls Chapter

### Program Schedule for 2014-15

Date Location	Session Time Est. CPE hours	Description / Presenter	Cost
<b>9/10/2014</b>  Ferrari's	4:00 4:30 6:10  6:10 7:00 7:00 7:50  3	Board Meeting Health Care Act John Monaghan EPI  Dinner Managing Health Care Lori Hoffman CFU	\$20
<b>10/21/2014</b>  Terex   Bremer Ave Diner	2:00 3:00 3:00 4:00  4:00 4:30 4:30 5:30  5:30 6:00 6:00 7:00  4.5	Fall Conference  Terex Tour Terex Consolidating Acct / Divisions Eric Joneson Terex  Transition to East Bremer Diner Federal Auditor for Indian Casinos Jean Wagner  Dinner Data Management Joshua Carroll, UNI Apps Lab	\$40
<b>1/8/2015</b>  UNI Schindler Bldg (Ed Center)	5:30 6:00 8:30    2	Board Meeting ICN Meeting BCS focus @ UNI Carrie Grimm, Strategic Marketing Services Jim Olson, Iowa Waste Reduction Center Rob Williams, Iowa Source Link Dan Beenken, Advance Iowa Alyssa Nolte, SnapShot, iTracking	Chapter Sponsored Pizza
<b>2/10/2015</b>  Hawkeye Community College	8:30 4:30    6	Money Smart Ag Conference @ Hawkeye Watch for additional info on session topics IMA Break out session AG Income Taxes Denise Bouska Bergan, Paulsen & Co	Chapter Sponsored lunch

## IMA – Waterloo Cedar Falls Chapter

### Program Schedule for 2014-15

Date Location	Session Time Est. CPE hours	Description / Presenter	Cost
3/10/2015  Ferrari's	4:30 5:20 5:30 6:00 6:00 6:50  2	Executive Compensation Ethics Brittany Silvey, Sr. Accounting/MIS Student, UNI Dinner Executive Compensation Ethics Lee Nicolas UNI	\$20
4/21/2015  Lone Star	4:30 5:20 5:30 6:00 6:00 6:50  2	Leadership Acadamey Workshop Dinner Leadership Acadamey Workshop Lori Brandt EPC as facilitator	\$20

Estimated CPE  
19 20 hours

Ferrari's Ristorante, 1521 Technology Parkway, Cedar Falls, IA  
 Texex Cranes, 106 12th St. SE, Waverly, IA  
 East Bremer Diner, 117 E. Bremer Ave., Waverly, IA  
 Hawkeye College, 1501 E. Orange Rd., Waterloo, IA  
 Lone Star Steakhouse, 4045 Hammond Ave., Waterloo, IA

Meeting dates and times are subject to change. Please check our website for current information at [www.imawcf.org](http://www.imawcf.org)  
 Reservations should be made to Vince Heuer, 319 233 9128, [heuerell@mchsi.com](mailto:heuerell@mchsi.com); or Deb Jungling [deb.jungling@episervice.org](mailto:deb.jungling@episervice.org)