



Waterloo-  
Cedar Falls  
Chapter

## **ROSTER AND PROGRAM BOOK**

**May 1, 2015 – April 30, 2016**



# **IMA Waterloo-Cedar Falls Chapter**

**2015 / 2016**

## **Roster and Program Book**

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## Welcome from the 2015-16 Chapter President

Last spring I was gently encouraged to allow my name to be placed on the Chapter nomination form on the line for Chapter President. The last time I served in this position was 1992-93 and since then several other active members have served multiple terms, so it was hard to decline. Besides, I am theoretically “retired” and should have the time available.

The group of active members who are called the Board of Directors have met twice this summer and have created a schedule of events for the coming year that should inspire our minds and create a continuous education for all of us. I was absent from the first meeting as I had taken my spouse to the Mayo Clinic for treatment, and when I returned the schedule of events had been “roughed out” and all that remained for the second meeting was the final planning.

I maintain both my CPA and CMA certificates in an active status, so I am a strong believer in continuous education. Now that John Grabow and Joe Schneider are no longer with us, I am probably the oldest active member in the chapter. Furthermore, I believe that good mental health requires that we continuously stimulate our brain. The schedule of meeting topics should satisfy this process as we have many challenging speakers lined up for the coming year.

A move last year by this chapter that I think we should all be quite proud of was the sponsorship of two students as CMA Exam Candidates. I hope this practice continues and we should support these two students in their efforts as well as choose two or more students to participate in the future. This was a good start in student development.

I look forward to the 2015-16 Chapter year and invite your colleagues to join you for chapter meetings.

Lee Nicholas, CMA CPA

IMA Waterloo-Cedar Falls Chapter  
[www.imawcf.org](http://www.imawcf.org)

2015 / 2016  
Board Members

Lee Nicholas	<a href="mailto:leenicholas@mchsi.com">leenicholas@mchsi.com</a>	287-3997	President CMA Director Regional Council Ethics Committee
Denise Bouska	<a href="mailto:drbouska@gmail.com">drbouska@gmail.com</a>	235-2667	Secretary Regional Council
Brandy Wilson	<a href="mailto:brandy.wilson@vgm.com">brandy.wilson@vgm.com</a>	274-4442	Treasurer
Lori Brandt	<a href="mailto:lbrandt@filterminder.com">lbrandt@filterminder.com</a>	234-0231 X-15	VP Administration Program Book
Rod Brockett	<a href="mailto:rodb@petersoncontractors.com">rodb@petersoncontractors.com</a>	345-2713 X-235	Web Master
Vince Heuer	<a href="mailto:heuerell@mchsi.com">heuerell@mchsi.com</a>	233-9128	Meetings/Attendance
Karla Hoppes	<a href="mailto:karla@cedarvalleywealth.com">karla@cedarvalleywealth.com</a>	266-6507 X-103	Director
Amy Igou	<a href="mailto:amy.igou@uni.edu">amy.igou@uni.edu</a>		Director
Deb Jungling	<a href="mailto:deb.jungling@episervice.org">deb.jungling@episervice.org</a>	232-6671	VP Membership Email Tree Employment
Eric Lee	<a href="mailto:eric.lee@uni.edu">eric.lee@uni.edu</a>	273-2402	Director
Funmi Obitayo	<a href="mailto:funmilayo.obitayo@hawkeyecollege.edu">funmilayo.obitayo@hawkeyecollege.edu</a>		CPE
Janice Rogers	<a href="mailto:rogers.janice7@gmail.com">rogers.janice7@gmail.com</a> <a href="mailto:Janice.rogers@uni.edu">Janice.rogers@uni.edu</a>		Director
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	Meetings
Pam Taylor	<a href="mailto:ptaylor@T3Solve.com">ptaylor@T3Solve.com</a>	269-6101	Director
Randy Thomas	<a href="mailto:professordeere@gmail.com">professordeere@gmail.com</a>		Director
Laurie Watje	<a href="mailto:laurie.watje@uni.edu">laurie.watje@uni.edu</a>	273-2020	Past President

## IMA – Waterloo-Cedar Falls Chapter

### Program Schedule for 2015-16

Date	Session Time	Description / Presenter	Cost
Location	Est. CPE hours		Students Free
<b>9/22/2015</b>	2:00 - 3:00	United Equipment Accessories, Inc. Tour Kevin Bailey, United Equipment Accessories	\$25
<b>Bremer Ave Diner</b>	3:00 - 4:00	Small Business Accounting Kevin Bailey, United Equipment Accessories	
	4:30 - 5:30	Dinner	
	2		
<b>10/28/2015</b>	4:30 - 5:30	Identity Theft Jay Schares, PDCM	\$25
<b>Clarion Inn</b>	5:30 - 6:00	Dinner	
	6:00 - 7:00	A to Z of Being a Volunteer Board Treasurer Norman Ussery, Waterloo Community Playhouse	
	2		
<b>11/4/2015</b>	8:30	<b>Fall Conference</b> Registration / Light Breakfast	\$50
<b>UNI BCS Bldg Room 33</b>	9:00 - 11:00	Excel Workshop Amy Igou, UNI	
	11:00 - 12:00	Individual Retirement Account Strategy Brad Carter, Bergan, Paulsen & Company	
	12:00 - 1:00	Lunch	
	1:00 - 2:00	Social Security Best Practices Mark McCombs, Lincoln Savings Bank	
	2:00 - 4:00	Excel Workshop continued Amy Igou, UNI	
	6		
<b>1/7/2016</b>	5:30	Board Meeting	Chapter
<b>Hawkeye CC</b>	6:00 - 8:30	ICN Meeting Tax Update Joe Kristan, Roth & Company, PC	Sponsored Pizza
	2.5		

## IMA – Waterloo-Cedar Falls Chapter

### Program Schedule for 2015-16

Date	Session Time	Description / Presenter	Cost
Location	Est. CPE hours		Students Free
<b>2/3/2016</b>  <b>UNI BCS Bldg Room 33</b>	4:30 - 5:30	CAFR (Comprehensive Annual Financial Report) Gary Shontz, UNI	\$25
	5:30 - 6:00	Dinner	
	6:00 - 7:30	UNI Revenue Bonds or Funding sources Gary Shontz, UNI	
	2.5		
<b>3/30/2016</b>  <b>Ferrari's (Ethics Sessions)</b>	4:30 - 5:30	Investigative Aspects of PFG (Peregrine) Scott Irwin, FBI	\$25
	5:30 - 6:00	Dinner	
	6:00 - 7:30	White Collar Crime Trends & Current Developments Randy VanGent, FBI retired	
	2.5		
<b>4/19/2016</b>  <b>Clarion Inn</b>	4:00 - 5:00	Workplace Behavior - Learning From the Good, the Bad and the Worst Celina Peerman, The Peerman Group	\$25
	5:00 - 5:30	Dinner	
	5:30 - 7:30	IT Security for your Home & Small Business Jason Ebensberger, UNI	
	3		

Estimated CPE  
19-20 hours

Ferrari's Ristorante, 1521 Technology Parkway, Cedar Falls, IA  
 United Equipment Accessories, Inc., 2103 E Bremer Ave., Waverly, IA  
 East Bremer Diner, 117 E. Bremer Ave., Waverly, IA  
 Hawkeye College, 1501 E. Orange Rd., Waterloo, IA  
 Clarion Inn, 5924 University Ave., Cedar Falls, IA  
 UNI BCS Bldg., UNI Campus south side of University Ave.

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)

## IMA Waterloo-Cedar Falls Chapter 2015/2016 Roster

John Adams	Adams Evenson & Co PC	Waterloo	IA
Denise Bouska, CMA, CPA	BergankDV	Waterloo	IA
Robert Bradshaw		Waterloo	IA
Lori Brandt, CMA	Engineered Products Co	Waterloo	IA
Rodney Brockett, CMA, CPA		Reinbeck	IA
Eric Brodahl	The VGM Group Inc	Waterloo	IA
Heather Burrows		Sumner	IA
Diane Caley, CMA, CPA		Parkersburg	IA
Leo Campbell		Cedar Falls	IA
Lucy Choplin, CPA		Waterloo	IA
Dr. Mary Christ, CPA	Univ of Northern Iowa	Cedar Falls	IA
Brittany Cord, CMA		Decorah	IA
Randall Costello, CMA, CPA	Iowa Insurance Seminar	Cedar Falls	IA
Colleen Dixon	Engineered Products Co	Waterloo	IA
Al Eilderts	Foundation Service Corp	Hudson	IA
Clinton Farlinger, CMA		Cresco	IA
Dale Folkers	Phantom EFX LLC	Waterloo	IA
T. Judy Hahm, CMA, CPA	Deere & CO	Bettendorf	IA
Andrea Hansen, CMA		Plainfield	IA
Kathleen Hart		LA Porte City	IA
Valerie Hennings, CMA	Terex	Waverly	IA
Vincent Heuer, CPA		Waterloo	IA
John Holden, CMA, CPA, CIA		Shell Rock	IA
Karla Hoppes	Cedar Valley Wealth Advisors	Cedar Falls	IA
Robert Hughes Sr		Independence	IA
Dr. Amy Igou, CMA	University of Northern Iowa	Cedar Falls	IA
Deb Jacobs	Waterloo Community Schools	Waterloo	IA
Peilan Johnson, CMA, CPA		Conroe	TX
Beth Johnson		Evansdale	IA
Eric Joneson, CMA	Terex Corp	Waverly	IA
Debra Jungling, CMA	Exceptional Persons Inc	Waterloo	IA
Robert Krogh, CPA		Waterloo	IA
Eric Lee, CPA	University of Northern Iowa	Cedar Falls	IA
Kasey Lewis		Waverly	IA
Chuchu Liao, CMA		Sunnyvale	CA
Matthew McGough, CPA		Muscatine	IA

## IMA Waterloo-Cedar Falls Chapter 2015/2016 Roster

Kevin McKinley, CMA, CPA	Dexter Magnetic Technologies	Elk Grove Village	IL
Lee Nicholas, CMA, CPA	University of Northern Iowa	Waterloo	IA
Gina Niewoehner	Caterpillar, Inc.	Hawkeye	IA
Funmilayo Obitayo, CPA	Hawkeye Community College	Waterloo	IA
Trenton Olmstead, CPA	DC Industries Inc	Waterloo	IA
Howard Peterson		Waterloo	IA
Jill Pliner		Clarksville	IA
Michael Ritter, CMA	GMT Corporation	Waverly	IA
Pamela Roberts, CMA, CPA	Stellar Industries Inc	Garner	IA
Janice Rogers	University of Northern Iowa	Cedar Falls	IA
William Schmid, CPA	Rydell Chevrolet Inc	Elk Run Heights	IA
Mariea Schnor, CPA		Fairbank	IA
Terri Seegers, CPA	John Deere Waterloo Works	Denver	IA
Bradford Shatzer	Veridian Credit Union	Waterloo	IA
Gary Shontz	University of Northern Iowa	Cedar Falls	IA
Dr. Hollis Skaife, CMA, CPA		San Francisco	CA
Gerald Smith, CPA	Univ Of Northern IA	Cedar Falls	IA
Jeff Sommerfeldt	Waterloo Comm School District	Waterloo	IA
Erica St. John, CPA		Waterloo	IA
Pamela Taylor, CPA		Cedar Falls	IA
Randall Thomas, CPA		Cedar Falls	IA
Deborah Vogeler, CMA	Fisher Controls Intl	Marshalltown	IA
Steven Warneke, CMA, CPA	Warneke Consulting Group	Readlyn	IA
Sharon Waschkat		Cedar Falls	IA
Laurie Watje, CPA	University of Northern Iowa	Cedar Falls	IA
Mark Weak, CMA, CPA	Professional Office Services	Waterloo	IA
Brandy Wilson, CPA	VGM Group	Hudson	IA

### Student Members

Jaquelyn Hanson, RTRP	Dealerbuilt	Mason City	IA
Christina Masek		Decorah	IA
Bobbi Ney		West Union	IA
Morgan Neyen		Cedar Falls	IA
Crystal Wisenbach		LA Porte City	IA
Rebecca Jo Woller		Fredericksburg	IA





Waterloo-  
Cedar Falls  
Chapter

## Our Members and Chapter





*IMA's Certification for  
Accountants and  
Financial Professionals  
in Business*

## IMA Waterloo-Cedar Falls Chapter 2015 / 2016

### CMA Holders

Denise Bouska  
Lori Brandt  
Rodney Brockett  
Diane Caley  
Brittany Cord  
Randall Costello  
Clinton Farlinger  
T. Judy Hahm  
Andrea Hansen  
Valerie Hennings  
John Holden  
Amy Igou  
Peilan Johnson  
Eric Joneson  
Debra Jungling  
Chuchu Liao  
Kevin McKinley  
Lee Nicholas  
Michael Ritter  
Pamela Roberts  
Hollis Skaife  
Deborah Vogeler  
Steven Warneke  
Mark Weak

IMA Waterloo-Cedar Falls Chapter  
2015 / 2016  
50 Year Members

Robert Bradshaw  
Leo Campbell  
Howard Peterson

IMA Waterloo-Cedar Falls Chapter  
2015 / 2016  
25 Year Members

John Adams  
Denise Bouska  
Lori Brandt  
Rod Brockett  
Diane Caley  
Randy Costello  
Al Eilderts  
Vincent Heuer  
Robert Hughes  
Debra Jungling  
Robert Krogh  
Matthew McGough  
Lee Nicholas  
William Schmid  
Terri Seegers  
Bradford Shatzer  
Hollis Skaife  
Gerald Smith  
Randall Thomas  
Deborah Vogeler  
Steven Warneke  
Mark Weak

IMA Waterloo-Cedar Falls Chapter  
2015 / 2016

Stuart Cameron McLeod Society (SCMS)  
or Society for Continuing Member Service

Amy Igou  
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.”

“The purpose of the Club is to provide a means whereby former officers and directors of the Association may continue the associations and contacts which they formed while in office and to make available to the current management of the Association the advice and experience of past officers.”

Excerpts from SCMS website <http://scms.imanet.org/>

Visit the SCMS website for more information on membership Benefits, Eligibility, Induction and Application.

# IMA Waterloo-Cedar Falls Chapter

2015 / 2016

## Chapter Competition History

### Competition Banners

1968	5 <sup>th</sup> Place
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
2012	9 <sup>th</sup> Place
2013	14 <sup>th</sup> Place
2015	14 <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 Utilities
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

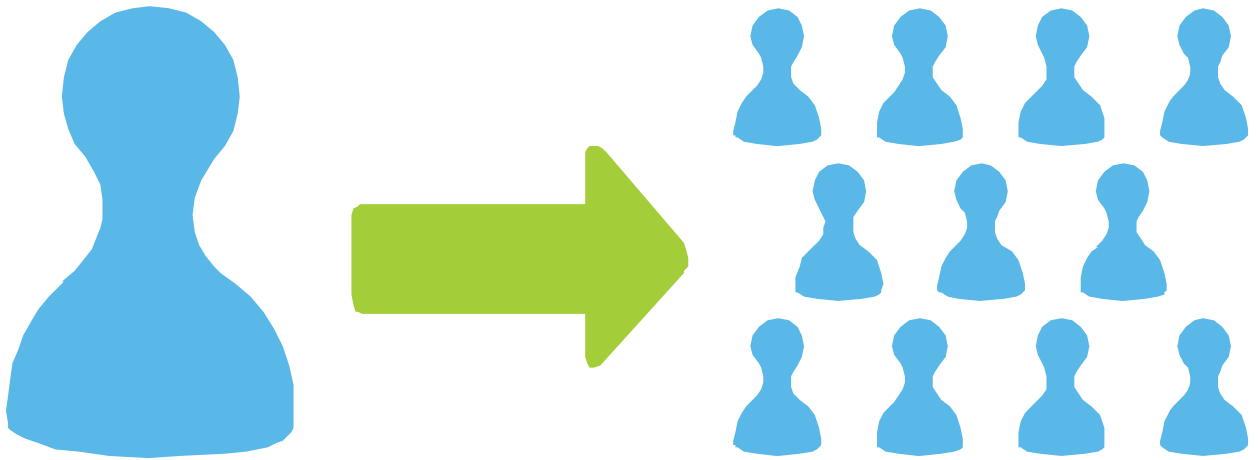
IMA Waterloo-Cedar Falls Chapter  
Past Presidents

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
2012-2013	Randy Thomas	Upper Iowa University
2013-2014	Randy Thomas	Upper Iowa University
2014-2015	Laurie Watje	University of Northern Iowa



The Association of  
Accountants and  
Financial Professionals  
in Business

## About IMA







The Association of  
Accountants and  
Financial Professionals  
in Business

## About IMA

Empowering accountants and financial professionals to drive business performance.

IMA is the worldwide association of accountants and financial professionals working in business. We are committed to helping you—and our more than 70,000 members—to expand your professional skills, better manage your organization, and enhance your career.

### **Strengthen your skills**

Power your career through our highly respected CMA® (Certified Management Accountant) credential and best-in-class professional development programs.

### **Connect with your peers**

Grow your professional network through the *LinkUp IMA* community, conferences, and local chapter.

### **Inform your strategic viewpoint**

Expand your knowledge with thought-leading publications and research on industry trends and developments.

### **Expand your career potential**

Market yourself with a portfolio of customizable professional development services to enhance your knowledge, professional leadership skills, and future opportunities.

Excerpt from [www.imanet.org](http://www.imanet.org) . Visit our website for more information.



## **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 Ethics Helpline Number: 800-245-1383\***

\*For callers in the U.S. and Canada. Other callers can access the Helpline by dialing another toll-free access code. See IMA's website for instructions:

[http://www.imanet.org/resources\\_and\\_publications/EthicsCenter.aspx](http://www.imanet.org/resources_and_publications/EthicsCenter.aspx)

IMA Waterloo-Cedar Falls Chapter  
2015 / 2016

Membership Information - Member Fees  
One-time-only application fee \$15

Regular	\$220	Academic	\$110
Young Professional	\$145	Student	\$39

Are there more than 5 members in your organization? Check out the membership discounts in the Staff Enrollment Program.

Chapter affiliation = 0086 Waterloo-Cedar Falls



“The CMA is the globally recognized, advanced-level credential appropriate for accountants and financial professionals in business. Achieving the CMA demonstrates your professional expertise in financial planning, analysis, control, decision support, and professional ethics – skills that are in demand by organizations around the world. Whether you want to enhance the value you bring to your current position, or expand your career potential, the CMA will help you set the standard for professional excellence. Excerpt from imanet.org website

Exam Fees

Certification entrance fee	\$240
Faculty/Student Certification entrance fee	\$180
Exam fee per part	\$395/ea
Faculty/Student Exam Fee Discount	25%

**Please visit IMA’s website for Membership and Certification details:**  
[www.imanet.org](http://www.imanet.org)





The Association of  
Accountants and  
Financial Professionals  
in Business

PROMOTIONAL CODE

## MEMBERSHIP APPLICATION

Revised 12/17/2014

<input type="checkbox"/> <b>New Application</b>  <input type="checkbox"/> <b>Renewal</b>  <input type="checkbox"/> <b>Certification</b> <i>(IMA membership required)</i>	<b>PERSONAL INFORMATION</b> <i>(please print)</i>		
	<input type="checkbox"/> Mr. <input type="checkbox"/> Ms. <input type="checkbox"/> Mrs. <input type="checkbox"/> Miss <input type="checkbox"/> Dr. Last/Family Name/Surname: _____		
	First/Given Name: _____		Middle Initial: _____ Suffix: _____
	Date of Birth (month/day/year): ____/____/____		Gender _____ Please indicate Customer/Member ID: _____

### PREFERRED ADDRESS Home Business

Company Name: \_\_\_\_\_

Street/P.O. Box: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Country: \_\_\_\_\_ Phone: *(Include Country/Area/City Codes)* \_\_\_\_\_

E-mail Address: \_\_\_\_\_ Fax: \_\_\_\_\_

Job Title: \_\_\_\_\_ Area of Responsibility: \_\_\_\_\_

Number of Employees: \_\_\_\_\_ Company Revenue: \_\_\_\_\_

### SIC CODE – STANDARD INDUSTRY CLASSIFICATIONS *(please circle one)*

- 01 Education
- 02 Healthcare
- 03 Media and Entertainment
- 16 Construction, Mining, Agriculture
- 21 Manufacturing
- 41 Transportation, Communication, Utilities
- 51 Wholesale/Retail Trades
- 61 Finance
- 63 Insurance
- 81 Business Services
- 82 Real Estate
- 86 High Tech
- 90 Nonprofit
- 93 Government
- 96 Pharmaceuticals & Biotechnology
- 99 Other \_\_\_\_\_

### A. MEMBERSHIP INFORMATION *(All payments must be in U.S. dollars)*

- Professional Membership** ..... \$220
- Young Professional** ..... \$145  
*(You must be 32 or younger and reside in the U.S., Canada, or Mexico.)*  
Date of Birth (Required) \_\_\_\_\_
- Student Membership** ..... \$39  
*(You must be taking 6 or more credit hours per semester at a college or university.)*  
School \_\_\_\_\_  
Expected Graduation Date (Year) \_\_\_\_\_
- Academic Membership** ..... \$110  
*(You must be a full-time faculty member.)*
- Certification**
  - CMA Entrance Fee (Nonrefundable) ..... \$240  
*(Except for college students and academics.)*
  - Student/Academic CMA Entrance Fee (Nonrefundable) ..... \$180  
*(College students and academics.)*
  - Chapter Affiliation ..... \$0  
(Parent) \_\_\_\_\_ (Student) \_\_\_\_\_

### B. REGISTRATION FEES

- Application Processing Fee** ..... \$15  
*(All new members except Students and Young Professionals.)*

**TOTAL DUE (add sections A and B) ..... \$ \_\_\_\_\_**

### APPLICANT STATEMENT

- Check here if you have ever been convicted of a felony. Please enclose a confidential letter with a brief explanation of circumstances to the attention of IMA President & CEO.

**I affirm that the statements on this application are correct, and I agree to abide by the IMA Statement of Ethical Professional Practice.**

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

### METHOD OF PAYMENT *(All payments must be in U.S. dollars)*

- Wire Payments**  
*All wire transfers must be made with bank fees prepaid. Please notify IMA by e-mail (ima@imanet.org) that you are paying by wire transfer. Include your name, amount sent, and wire transfer receipt number.*
- Check Payments**  
My check for \$ \_\_\_\_\_, payable to IMA, is enclosed.  
*(No checks drawn on foreign banks will be accepted unless they are payable through U.S. correspondent banks and in U.S. dollars.)*
- Credit Card Payments**

Charge my credit card:  AMEX  Discover  MasterCard  VISA

Card Number: \_\_\_\_\_

Security Code: \_\_\_\_\_ Expires: \_\_\_\_\_

Cardholder Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Promotional code (if applicable): \_\_\_\_\_

A subscription to *Strategic Finance* (\$48, \$25 for students) is included in dues and is nondeductible. Members also receive a subscription to *Management Accounting Quarterly* and the *IMA Educational Case Journal*.

### INSTITUTE OF MANAGEMENT ACCOUNTANTS, INC.

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