



Balance Sheet

VOL. 82, NO. 7

DAYTON CHAPTER

Happy New Year! Start the year off right by joining us next Tuesday!

PRE-DINNER SPEAKER

January 20, 2009

5:30 p.m.

Mandalay Banquet Center

William Hallmark

Deloitte & Touche LLP

State & Local Tax Update



William T. Hallmark is Manager of the MTS Practice Group with Deloitte Tax LLP where he also works as a state tax consultant in the areas of income, franchise, sales, and

use taxes.

Mr. Hallmark assists senior management with business development and practice administration by functioning as a leader and manager for senior and staff consultants and by providing extensive research and writing on income, franchise, and sales/use issues. Mr. Hallmark has also worked as the Vice President-Tax Counsel/ Consultant with National City Commercial Capital Company, LLC and as a Senior Tax Consultant with Ernst & Young, LLP.

Mr. Hallmark graduated from the University of Cincinnati's Carl D. Lindner College of Business with a BBA and a double major in Accounting & Finance; Capital University Law School JD, LLM – Taxation; and Northern Kentucky University with a MBA in Management & Finance. Mr. Hallmark is also a Registered Attorney in Ohio.

DINNER PROGRAM SPEAKER

January 20, 2009

6:30 p.m.

Mandalay Banquet Center

Richard Stock, PhD.

University of Dayton

Is Dayton's Future Decoupled from that of the Nation

Richard D. Stock, Ph.D. is currently serving as the Director of the Business Research Group (BRG) at the University of Dayton. Since joining the Business Research Group in 1992, Dr. Stock has served as Project Manager and/or Principal Investigator on a wide variety of BRG projects involving market research for public and private clients and program evaluation for education and health providers.



Dr. Stock has served as the Director of the BRG for the past seven years and he continues to produce a quarterly forecast of the regional Dayton economy for National City Bank as part of that work. BRG is a profit center with the School of Business Administration and operates as a full service market research firm providing economic analysis, survey research and focus group services.

Dr. Stock received his Ph.D. in Economics from the University of Colorado, Boulder, 1986 and has 22 years of experience in economic analysis, program evaluation and market research.

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President's Message

It's the first month of a New Year and time to consider some resolutions that will enhance your professional career. However, in our desire to envision our resolutions, we often overlook the valuable opportunities that are available to us right here in the Miami Valley.

Your Dayton Chapter of the IMA presents one of the most valuable opportunities for professional training, certification and networking in the Miami Valley. Consider the following facts about our chapter:

- The chapter membership includes over 300 local accounting and finance professionals and over 100 of those members have already earned a professional certification as a CMA, CPA, or CIA.
- The chapter publishes a complimentary annual program book with the names and contact information of every local member.
- The chapter hosts eight dinner meetings and one lunch meeting each year which means you have nine opportunities to meet your fellow professionals from the local business community.
- The chapter hosts at least 18 CPE sessions each year which means you have 18 opportunities to learn new skills or receive updates on topics that are important to your job and your company. Compare this cost to a CPE self study course from the IMA with a subscription cost of at least \$187 per year.

We will have three opportunities to earn CPE credits in January. This month's dinner meeting will have presentations by William Hallmark, Manager of the MTS Practice Group at Deloitte Tax LLP and by Richard Stock, Director Business Research Group (BRG) at the University of Dayton. On Friday, January 23rd, we will have the second half of the IMA Ethics Seminar that we started in December. Mark your calendars for these valuable opportunities and invite a friend, colleague, or fellow member to an evening of CPE and networking.

Tony Griffin
President

ARE YOU NEW TO THE DAYTON CHAPTER?

We want to make a special invitation to our newer members who haven't attended a dinner meeting, yet. If you are interested in attending at a special rate, please contact Barry S. Smith, Phone: (937)427-1272, or Email bsmithcpas@netzero.net



Here are the calendar details (and CPE opportunities!) for the next two months. We hope that you will plan on joining us at the Mandalay Banquet Center every month beginning at 5:30 p.m. for the CPE session and 6:30 p.m. for the dinner session.

<u>MEETING DATE</u>	<u>CPE SESSION SPEAKER & TOPIC</u>	<u>DINNER SESSION SPEAKER & TOPIC</u>
Tues, Feb 19th, 2009 STUDENT NIGHT	Jason Ortiz "Real Estate-Foreclose Options"	Todd Dewitt "Leadership - Motivation"
Tues, Mar 17th, 2009	James Whalen "7 Strategies to Reinvent Your Business"	J. Michael Henson "Financial Issues in Government Contracts"
Tues, Apr 21st, 2009	Phil Parker "Economic Development-Dayton"	Bob Davis "International Financial Reporting Standards"

HELP WANTED

We are looking for chapter members to come and speak to students about their professional experience (see below for an idea of areas). You would only need to prepare approximately 5 to 7 minutes of material and we will provide you points to cover.

We would greatly appreciate your help!

When: Feb. 17, 2009 **(STUDENT NIGHT)**

Time: 4:30 p.m. – 5:25 p.m.

Where: Mandalay Banquet Center

Why: to help with roundtable discussions with students regarding different positions and areas of the accounting profession

POSSIBLE FUNCTIONAL AREAS FOR YOU TO REPRESENT:

Cost Accounting	Financial Systems
Financial Reporting	Internal Auditing
General Accounting	Government Accounting
Accounting Manager/Controller	Public Accounting
Forensic Accounting	

IMA Redefines Management Accounting through New Statement on Management Accounting Release

To reflect the increasingly strategic role of the management accounting profession, IMA released its latest Statement on Management Accounting (SMA): Definition of Management Accounting on December 11, 2008. [Click here](#) to read more.

Ohio Council Events

The Council will be holding its quarterly board meeting next week.

When: January 22, 2009

Time: 5:15 p.m.

How: 1-800-261-3225

Code - 2728906

It's not too early to start thinking about the **MEONSKE CONFERENCE** in Kent

When: Apr 23-24, 2009

Where: Kent State University

CINCINNATI NORTH CHAPTER DINNER MEETING

Wed., January 21, 2009
Sheraton Cincinnati North Hotel

5:40-6:30	Tax Update
8:00-9:00	Innovative Financing

Cost \$30

Reservations – (deadline Fri, Jan 16th)
Please contact Ted Hyle at
513-552-6240 or
controller@sheratoncincinnati.com

For more information, visit:
<http://cincynorth.imanet.org/>

GLEIM DISCOUNTS FOR DAYTON CHAPTER MEMBERS

All Four Exam Parts

Complete System (book, CD-ROM, audio CDs, Gleim Online): \$503.17 (32% discount)

CMA Gleim Online: \$314.88 (30% discount)

Book and Test Prep CD-ROM: \$243.04 (20% discount)

Single Exam Part

Complete System (book, CD-ROM, audio CDs, Gleim Online): \$149.77 per part (30% discount)

CMA Gleim Online: \$87.47 per part (30% discount)

Book and Test Prep CD-ROM: \$60.76 per part (20% discount)

To learn more, [please contact Chad Murray](mailto:chad.murray@gleim.com) at (800) 874-5346 ext. 222.
via email at chad.murray@gleim.com. Hours: Mon-Fri: 10am-7pm est.

Please visit their home page: www.gleim.com

TAX MANAGER (not public accounting) 3 to 8 Years Experience

Salary = \$60,000 to \$70,000

Performs tax preparation, tax research and tax planning with minimal supervision. Provides work direction and technical guidance to less experienced staff. Contacts clients to resolve minor tax matters. Performs tax planning under direct supervision. Responds to taxing Agencies upon inquiry.

Responsibilities:

- (1) Prepares individual and corporate tax returns, including tax engagement files.
- (2) Prepares individual and corporate estimated tax calculations and vouchers.
- (3) Recognizes, anticipates and resolves tax and compliance issues; makes recommendations.
- (4) Reviews tax information supplied by clients; meets with or calls clients with questions.
- (5) Assists Tax Director with research and transaction related projects.
- (6) Assists Tax Director with year-end tax planning.
- (7) Works with Accounting Department to record information and document path into tax area, including documenting all book/tax differences.
- (8) Manages process of gathering information needed to complete tax returns on a timely basis, including coordinating with other departments within organization.
- (9) Meets with clients to explain tax issues and review complicated tax returns.
- (10) Manages tax agency audits and responds to written correspondence related to tax filings.
- (11) Performs other duties as assigned.

Minimum Education and Experience:

Bachelor's degree in Accounting or equivalent work experience

CPA Certification

Send resumes to **Scott Peeler, Mergis Group** at:

Ph: 937-439-5501 x 215

Fax: 937-439-5520

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JANUARY, 2009

MEETING REGISTRATION FORM * MANDALAY BANQUET CENTER

Meeting Date, Tuesday, January 20, 2009

Please reserve by Thursday, January 15, 2009

Do you plan to attend the 5:30 p.m. session? Yes No (please mark)

6:30 p.m. Main Entrée: Chicken Picatta

Reservation is for _____ member(s) & _____ guests

Member Name: _____

Guest Name: _____

Amount enclosed \$ _____ (\$27 advance reservation, \$30 at door)

Please make checks payable to Dayton Chapter IMA.

(You may call/fax in your advance reservation with all information and pay at the door; however, no-shows will be charged.)

Dinner preference: Main Entrée _____ Vegetable Plate _____

Send checks with reservations to:

Dennis Cable
K-force Professional Staffing
Work Phone: 937-449-1725 Fax 937-461-6888
Email: dcable@kforce.com