



Balance Sheet

VOL. 83, NO. 3

DAYTON CHAPTER

Join us for the start of an exciting new season!

PRE-DINNER SPEAKER

September 15, 2009

5:30 p.m.

Mandalay Banquet Center

Ray Copenheaver

Ohio Partnership Plan – Long Term Care



Ray Copenheaver, CLTC, LTCP, is an experienced Long Term Care Insurance specialist. He owns and leads an insurance agency in Kettering, Ohio, which is dedicated to long term care insurance. It represents 18 of the largest long term care insurance firms.

Ray is a certified Ohio Partnership Trainer, a certified LTCP Trainer and he conducts continuing education classes for life and health agents in Ohio. He presents, annually, Ohio CE courses for the Dayton Bar Association, Society of CPA's, Social Workers.

Ray began insurance planning in 1993, after 36 years of marketing with NCR Corp. He has been providing long-term care insurance solutions for clients since late 1996. Ray earned his CLTC designation in 2000. Ray earned his LTCP* designation and LTCP trainer status in early 2009, a prestigious designation granted to professionals completing a high level training program in long-term care planning.

Ray is active in Senior Services and Senior Planning of the Miami Valley, including membership in the Miami Valley Long Term Care Association, and a member/board officer of MVGC, the Miami Valley Gerontology Council for 9 years.

DINNER PROGRAM SPEAKER

September 15, 2009

6:30 p.m.

Mandalay Banquet Center

Richard Nagel

President – Regent Systems Inc.

Managing the Relationship with Your Banker

Richard Nagel has approximately 30 years of experience in the banking industry, and since 2003, he has been with Regent Systems Inc. At Regent Systems, he President and CFO and is responsible for the day to day operations, as well as business development and dealing with the company's bank and accounting firm.

Regent Systems provides networking services, Web design and Web support for federal agencies and companies.

Richard has worked with high profile banking institutions including Key Corp, Provident Bank and National City in various functions and departments. His operational and financial experience combined with his broad banking experience; provide him with great insight on managing the relationship between a company and its bank. He also spent time consulting for the Miami Valley Economic Development Coalition.

Mr. Nagel received his undergraduate business degree from Indiana University and attended the Stonier Graduate School of Banking at the University of Delaware. He has also taken additional ABA courses in commercial lending and international banking.

He and his wife Kathy live in Dayton and have two children. His daughter is an accountant and his son is a Sports Reporter with the Dayton Daily News.



INSIDE

- **President's Message**
- **Prepay Plan**
- **09-10 Chapter Board**
- **Student Conference**
- **Help WYSO!?!**
- **Meeting Reservation**

President's Message

Drum roll.....we are finally ready to start a brand new season of speakers for the 2009-10 dinner series. We are putting on the final touches for the speaker line-up. I would like to thank the board for their hard work in forming another great list. I am also excited that we have four new board members, which is the most that I can remember since starting my own journey on the board back in 2000. You can view the board on page 3 and I welcome the new members and their insight.

Mark your calendars now and invite a friend, colleague, or fellow member to our first meeting on Tuesday, September 15th. The pre-dinner session begins at 5:30 with a presentation by **Ray Copenheaver**, who will provide us with the updates in the Ohio Partnership Plan for long term care insurance. If this doesn't affect you professionally, it should be informative personally. Our after dinner speaker, **Richard Nagel** from Regent Systems, Inc., will bring us some unique insight on how to manage the relationship with your local banker.

Please note below my message that we are still offering the convenience the Prepay Plan, which offers automatic monthly reservations and a discount on the monthly meeting price. The annual season ticket cost for this year will be the same as last year at **\$195** and you can make your payment up until the meeting on September 15th.

I look forward to seeing all of you next Tuesday, September 15th, for an evening of CPE and networking.

Paul Myers
President

LIKE TO KEEP SOME MONEY IN THE BANK?



You can save both time and money in the upcoming year by prepaying for all of your dinner reservations at once. You save part of the cost of a dinner, and as importantly, you don't have to bother with sending in your check each month nor do you have to make a reservation—your place will be waiting for you!

Prepayment is only \$195 if paid by September 15, 2009.

For those of you who prefer to make a reservation each month, the rates will be \$27 if you make an advance reservation and \$30 without a reservation.

If you would like to take advantage of this limited time offer, please make checks payable to "IMA – Dayton Chapter" and bring them to the September dinner meeting. Please email me at paul.myers@itwfeg.com or notify Dennis cable when you register for the September meeting.



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.

MEETING DATE	
Tues, Oct 20st, 2009	October Dinner Meeting
Thurs, Oct 22nd, 2009	Ohio Regional Council Meeting
Tues Nov17th, 2009	November Dinner Meeting

INTRODUCING THE 2009-2010 BOARD OF DIRECTORS

Congratulations to all and thank you for your efforts in the upcoming IMA year!
Welcome to new board members Joe Bennett, Larry Dragosavac, Kellye Maiorano, Donna Staker

You can still help out in the areas of special activities, tours, CMA Affairs
Contact a board member if you want to get involved!

President: Paul Myers

ADMINISTRATION & FINANCE

VP Admin Stacy Finch
 Secretary Stacy Finch
 Treasurer Ginny Barker
 CPE Coordinator Sue Terzian

COMMUNICATIONS & COMMUNITY RELATIONS

VP Communications David Ryan
 Director of Communications Paul Myers
 Director Public Relations Donna Staker

Program Book Editor
 Program Book Advertising
 Community Responsibility &
 Special Activities

Tony Griffin
 Jeff Clegg
 Kellye Maiorano

MEETINGS & MEMBERSHIP

VP Meetings & Membership
 Director of Meetings
 Director of Member Roster
 Director of Member Relations
 Director of Speaker Mgmt.
 Director of Academic Relations

Ken Rosenzweig
 Dennis Cable
 Toni Walchner
 Barry Smith
 Joe Bennett
 Larry Dragosavac

COMMUNITY SERVICE **HELPING WYSO**

The new Director of Community Responsibility and Special Activities, Kellye Maiorano has identified a Service Project for the Chapter.

WYSO is conducting its fall membership campaign drive October 3rd through Oct 11th.

We are in search of 8 individuals to volunteer to man a 1 ½ hour shift on October 10th to answer phones.

Please contact Kellye at kam3562@sbcglobal.net if you are interested in helping with this service opportunity.

IMA's 20th Annual Salary Survey

Despite the economic crisis, IMA's 20th Annual Salary Survey indicates that professionals holding IMA's CMA certification have greater earning power – 24% higher in salary and 31% higher in total compensation – than their noncertified colleagues.

These findings appear in the June 2009 issue of IMA's [Strategic Finance](#) magazine.

Linkup IMA – It's a great IMA networking tool -Check it out at www.imanet.org/linkupima/



LinkUp IMA

The Network for Accountants and Financial Professionals

- Powered by Members

Visit the web-site at <http://www.dayton.imanet.org/>

INTERNAL AUDIT TRAINING – CONTRACT AUDITING
PROVIDED BY THE IIA AND HELD AT WRIGHT STATE

WHEN – Oct 5th and 6th – Register by Sept 21st

CONTACT – Carol Vuckovich at 937-775-3887 or carol.vuckovich@wright.edu

LEARNING OBJECTIVES

- Identify the different sources of contract law, and related requirements
- Analyze different parts of a contract, from the basic components to more complex provisions
- Plan and audit of contracts, from start to finish
- Develop tools for optimizing audit sampling as it relates to selecting contracts for review
- Perform tests of controls and substantive tests, and optimize the reporting of significant findings

WHO SHOULD ATTEND

- Audit staff or managers who are planning to engage in a contract audit
- Non-audit managers interested in enhancing their understanding of contracts

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 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

2009 – 10th ANNUAL
STUDENT CONFERENCE

Are you a student or know of a student who could benefit from attending the IMA Student Leadership Conference?

The conference takes place November 5 – 7, 2009 at the Union Station Marriott in St. Louis, Missouri

If there is an interest in some financial assistance to attend the conference, please contact Paul Myers 332-2304 or paul.myers@itwfeg.com

**IMA's 10th Annual
Student Leadership
Conference**

Visit the web-site at <http://www.dayton.imanet.org/>



Paul Myers
2518 Jaysville St. Johns Rd.
Arcanum, OH 45304

<http://www.dayton.imanet.org/>

SEPTEMBER, 2009

MEETING REGISTRATION FORM * MANDALAY BANQUET CENTER

Meeting Date, Tuesday, September 15, 2009

Please reserve by Thursday, September 10, 2009

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

6:30 p.m. Main Entrée: Top Sirloin

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

Work Phone: 937-232-8671 Fax 937-439-4104

Email: cable0210@sbcglobal.net