



# Balance Sheet

VOL. 97, NO. 10

DAYTON CHAPTER

**Congratulations to all of the Dayton Chapter CMAs!**

## DAYTON IMA CPE OPPORTUNITY (2.0 Hours)

*Tuesday, March 19, 2024 – starting at 5:30 pm – Engineers' Club of Dayton*

### IMA Ethics Program - People and Profitability in a Sustainable World

This course is designed to help finance and accounting professionals understand their role regarding the ethical considerations given by a business to people and profit. An instructor will lead us through two case studies based on real life situations. The first case involves an individual employee who is feeling the effects of a vendor payment policy put in place by the CFO. The second case study involves an individual who discovers unethical behavior by a co-worker, but the behaviors are humanely understandable. This course allows participants the opportunity to think about how to best handle ethical dilemmas where the outcome of organizational decision making has a great impact on people.

**Learning objectives:** Appraise and become more familiar with the *IMA Statement of Ethical Professional Practice*. 2. Compare various philosophies relating to behavioral ethics and values for decision making. 3. Examine two examples of ethical situations that can occur at different phases of an individual's career. 4. Recognize the purpose of a code of ethical conduct for professionals. 5. Conclude the fairness and/or appropriateness of the ultimate outcomes.

We will begin at 5:30 p.m., take a break for dinner around 6:30 p.m and then conclude the program after dinner.

## LET YOUR VOICE BE HEARD AS A VALUED IMA MEMBER!

**Share your voice** in our [engagement benchmark study](#). Your candid feedback will help us better meet your needs and expectations. Thank you if you've already completed the survey.



**Take the Survey**



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

## **PRESIDENT'S MESSAGE**

We certainly have been on a weather roller coaster as we look to transition to spring soon. We had a wonderful group of almost fifty students and faculty in February. A special thanks to all of the members who supported our annual Student Night Event..

This month, in recognition of all our CMAs, we will present one of IMA's Ethics programs. This will allow all CMAs an opportunity to meet their annual Ethics requirement with the opportunity to discuss situations and ideas with fellow chapter members.

We will be presenting **People and Profitability in a Sustainable World**. You will analyze two (2) IMA Educational Case Journal (IECJ®) case studies, as well as IMA's Statement of Ethical Professional Practice and other ethical theories and principles, to assess how one's personal values and the behavior of others can affect your own ethical decision making. This qualifies for 2 hours of Ethics ICMA CPE. We will begin at 5:30 p.m., take a break for dinner around 6:30 p.m and then conclude the program after dinner.

Are you interested in engaging with IMA and the profession in a new way? The chapter board is a great way to network with professionals, develop or share leadership skills in a friendly environment. I welcome and encourage you to consider an opportunity. There are different roles, and we can work with you to identify what works for your interests and schedule.

*Paul Myers*

### **Thinking about your first or next Certification?**

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### **Consider joining the Dayton Chapter Board!**

Consider engaging in IMA and your profession in a new way..

Chapter Board Participation can help:

#### **You –**

- by providing an opportunity to develop your leadership and communication skills.
- by providing an opportunity to further network with community leaders
- an increased understanding of the benefits IMA has to offer

#### **The Chapter**

- Fresh ideas for programs and local presentations and events.
- Insight for improved administration

If you would like to learn more, please contact Paul Myers at [dayton@imachapter.org](mailto:dayton@imachapter.org) or any other Dayton Chapter board members.

**Share and grow with your local chapter network!**

## IMA ANNUAL CONFERENCE – REGISTRATION OPEN

**SAN ANTONIO - EARLY BIRD PRICING THROUGH APRIL 12**



Accounting and finance leaders will begin shaping a better future at IMA24. This one-of-a-kind event is the place to immerse yourself in riveting discussions and impactful collaborations. IMA24 is more than a conference; it's a dynamic platform where inspiration meets innovation.

New this year: Enjoy two days of keynote sessions, specialty tracks, workshops, and networking. Then, carve out a third day on your calendar for a targeted exploration of Embracing Opportunity in the Age of AI. Join us at IMA24, where you'll discover your path to a brighter tomorrow.

### **Connect**

Engage in deep conversations and build lasting relationships

### **Experience**

Create your schedule to drive your career goals.

### **Learn**

Discover new ideas from peers and world-class experts.

## **FEBRUARY STUDENT EVENT HIGHLIGHTS**

We were so pleased to have almost 50 students and faculty join us in February for our annual Student Event. We had chapter members meeting with students to talk about their professional journeys and to learn about IMA and the tools it offers students and professionals.



Our first speaker was Brian Hock, of Hock International. Brian shared the importance of thinking strategically about your career path and the importance of certification, continuing education and professional membership and development. After lunch, we heard from Chris Spanier, of Carpe Diem Consulting. He walked us through steps to help build our personal brand.

## **IMA Certificate Programs**

### **IMA Cybersecurity & Data Practices Certificate™**

Protect your company and yourself from evolving cyber threats through this online certificate program, which provides accounting and finance professionals with essential educational tools. Learn where to turn for expert guidance on changing data practice compliance regulations and become an effective business partner in managing risks associated with cybersecurity.

Member: \$149 | Nonmember: \$249

**4.5 NASBA CPE**



### **IMA Financial Planning & Analysis Certificate™**

Strengthen your financial planning & analysis (FP&A) skills and help drive organizational performance while earning a professional certificate and a digital badge. Follow hypothetical case studies and real-life examples as this three-part series helps you align your company's strategy across the organization and drive its overall performance.

Member: \$249 | Nonmember: \$349

**7.6 NASBA CPE**



### **IMA Sustainability Business Practices Certificate™**

Learn how to acquire the critical skills needed to meet the changing sustainability business landscape, regulatory requirements, and effective environmental, social, and governance (ESG) management. In the end, you'll champion the role of an effective business partner in driving the integration of sustainability in business, strategies, planning, performance, monitoring, and reporting.

Member: \$299 | Nonmember: \$449

**10.8 NASBA CPE**





## UPCOMING WEBINAR SCHEDULE

### ***INSIDE TALK***

#### **Advancing into the Future: A Digital-first Blueprint for Superior Performance and Readiness**

**Monday, March 18, 2024 from 11 a.m. to 12:00 p.m. (EDT)**

Field of Study – Information Technology – Technology & Analytics

Explore the transformative power of digital first strategies in our upcoming webinar. Learn how AI and machine learning-driven digital twin technologies, coupled with Zero Trust cybersecurity frameworks, are revolutionizing capital investment decisions. Gain insights into enhancing financial stability, operational efficiency, risk mitigation, and readiness for a net zero emissions future.

#### **Emerging Trends in FP&A for 2024**

**Wednesday, March 20, 2024 from 1:00 p.m. to 2:00 p.m. (EDT)**

Field of Study – Business Management & Organization – Strategy, Planning & Performance

Join Tim Caudill and Matthew Sledge from Jedox as they discuss the latest trends in financial planning and analysis (FP&A) and explore emerging solutions for integrating these trends into organizations. Learn how these trends are shaping the future of the finance function and discover how to implement them in your organization.

After this webinar, you will be able to:

1. Describe emerging trends in FP&A.
2. Summarize how organizations are using finance trends to gain competitive advantage.
3. Explain the benefits of these finance trends for the financial sector.

#### **Beyond the Unexpected: Mastering Resilience in Times of Uncertainty**

**Wednesday, March 27, 2024 from 1 p.m. to 2:30 p.m. (EDT)**

Field of Study – Business Management & Organization – Strategy, Planning & Performance

In a recent survey of more than 1,300 C-suite and finance and accounting (F&A) professionals, a staggering 78% identified a potential global financial crisis as their foremost worry. Although F&A departments are familiar with economic challenges, recent events have caught even seasoned professionals off guard. The pressing question for F&A teams is: How can they enhance business agility and resilience in the face of the unknown? Join Ali Steinman and Jon Wolf from BlackLine as they discuss the F&A concerns identified in the survey, and how F&A leaders can make their businesses more agile and secure in an increasingly unpredictable world.

To check out upcoming webinars at any time, members can visit:

<https://www.imanet.org/education-center/webinars>