

**3<sup>rd</sup> Annual IMA Michigan Fall Conference**  
**Tuesday, October 26, 2004**  
**Kellogg Center, Michigan State University in East Lansing, Michigan**  
**“Excellence and Professionalism in Financial Management”**

Sponsored by the IMA Michigan Council & Lansing/Jackson Chapter of IMA  
8 hours of Continuing Professional Education

8:00 AM – 8:30 AM – Reception & continental breakfast / Participant welcome

8:30 AM – 9:20 AM – **“Update on the Economy”** - David G. Sowerby, CFA, Vice President, Loomis Sayles & Company, L.P.

9:20 AM – 10:10 AM – **“Sarbanes-Oxley Implementation & Key Controls”**- Kirk Balcom, CIA, CISA, Principal – Internal Audit and Sarbanes-Oxley Consulting - The Rehmann Group

10:10 AM – 10:25 – Morning Break

10:25 – 11:25 PM – **“Performance Architecture - Linking Strategy to Performance”** - Paul Sharman, ACMA, IMA Interim Executive Director & President - Focused Management, Inc.

11:25 AM – 12:10 AM - **“Best Practices in Business Process Sourcing”** - Penny Weller, PhD, CMA, The Hackett Group

12:10 PM – 1:30 PM – Lunch, Awards, and Keynote Speaker

- **“Special Awards and Recognition”** - Michigan Council leaders, Financial Executive of the Year, chapter awards, and student awards - Sue Crane, Michigan Council President
- Keynote luncheon speaker - Captain Larry White, CMA, CFM, CPA - IMA National Chair, and Deputy Chief Financial Officer, U.S. Coast Guard – **“Management Accounting: Path to Strategic Business Leadership”**

1:30 PM – 2:20 PM – **“State of Michigan Budget and Financial Outlook”** - State of Michigan Budget Director, Mary Lannoye

2:20 PM – 2:40 PM – Afternoon Break

2:40 PM – 3:30 PM – **“Ethics in Action – Is it a Conflict of Interest?”** – Panel discussion - Moderators: Janet G. Seefried, President, Seefried & Associates - IMA Ethics Committee Chair; Susan E. Bos, CMA, Tax & Accounting Manager, Washtenaw County Treasurer's Office - IMA Finance Committee Chair; Nancy J. Garibay, Senior Vice President & Controller, Toledo Area Chamber of Commerce - IMA Ethics Committee; and Dr. D. Robert Okopny, CMA, CIA, CFE, Professor of Accounting, Eastern Michigan University - IMA Ethics Committee

3:30 PM – 4:20 PM – **“The Cultural Impacts of Doing Business in China”** – Dr. Jerome D. Hill, Of Counsel to Butzel Long, and Visiting Professor in the Department of International Programs at Oakland University

4:20 PM – 4:30 PM – Summary and business card exchange