

Date: Tuesday, March 17, 2009

Location: **Beacon Club**
5830 Portage Road
(3/4 mi. south of I-94 Exit 78)
Portage, MI 49001
269-343-9000

Times:
3:15 - 3:30 p.m. Registration
3:30 - 5:15 p.m. Seminar
5:45 p.m. Dinner
6:30 p.m. Speaker

Irish Dinner Buffet: **Corned Beef and Cabbage, Irish Stew, Shepard's Pie, and more***
\$25 Members and Guests
\$10 Students

(Dinner speaker presentation is free if you choose not to enjoy dinner)

Reservations requested---

Please RSVP to Mark Woodin via email:
mark.woodin@theima.org

*Includes salad, freshly baked rolls, dessert, and beverage (pop, coffee, or tea).

Tickets will be sold, at the registration table, for beer, wine, and mixed drinks.

<---**NOTE the early dinner time for this meeting!**

MARCH SEMINAR

"Internal Control, Ethics, and Finance"
From the IMA Ethics Series: Success Without Compromise
Donna S. Hetzel, CPA, CMA, CFM,
Facilitator

Review of the detailed history of Ethics at IMA and the development of the Statement of Ethical Professional Practice. The importance of maintaining good ethical behavior when documenting information, communicating information, and making recommendations is emphasized. Next, the Standards of Credibility, Confidentiality, Competence and Integrity guide users through a video case study of a real-life ethical dilemma. **This course meets the annual ethics requirement for CMA and CFM members.**

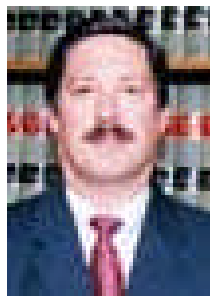
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EXCHANGE

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Donna Hetzel teaches MBA and entry level accounting classes at WMU, and formerly at Kalamazoo College, KVCC, and Siena Heights University. She was chosen the 1994-95 Delta Sigma Pi Accountancy Professor of the Year. Her industry experience includes Pfizer, Quantum Resources, and The Perrigo Company. She obtained a Master of Science in Accountancy with Honors, at Western Michigan University, and a Bachelor of Science in Education, Spanish and English majors, from Ohio State University.

MARCH DINNER PRESENTATION: "Estate Planning"



By Michael Shields, Attorney for Lewis, Reed, & Allen P.C.

Michael A. Shields earned his Bachelor of Arts, Cum Laude, from Hope College in 1981, and his Juris Doctor, Magna Cum Laude, from the University of Toledo's College of Law in 1986.

Michael obtained his certification as a Certified Public Accountant, State of Michigan, in 1983, and as a Certified Financial Planner, International Board of Standards and Practices for Certified Financial Planners, in 1990. He also holds a Certificate of Completion in Probate and Estate Planning issued by the Institute of Continuing Legal Education and the Probate and Estate Planning Section of the State Bar of Michigan in 2005.

Michael's practice focuses on business planning, organizational planning and documentation, acquisitions and mergers, estate planning, preparation of Wills and Trusts, probate administration, real estate transactions, and business and tax research.

Michael is a member of the Kalamazoo County Bar Association, State Bar of Michigan, American Bar Association, Michigan Association of CPA's, American Institute of CPA's and International Board of Standards and Practices for CFP's. He was Treasurer of the Kalamazoo County Bar Association (1993-1995). He is also a lecturer for the Institute of Continuing Legal Education (ICLE).

Michael has authored several publications, including "Planning for Spouses and Descendants" and "Trusts by Citizens or Residents for Noncitizen Spouses (Qualified Domestic Trusts)", Michigan Revocable Grantor Trusts (ICLE). He is also author of the "Inheritance Tax" Section of the Michigan Probate Sourcebook (ICLE) and "Michigan Estate Tax", Taxation of Estates and Trusts (ICLE). He is co-author of "Real Estate Reporting Expanded by New Regs.", Taxation for Accountants (March 1991).

Annual Kalamazoo Chapter Ethics Seminar & Dinner Meeting ***Tuesday, March 17, 2009 at the Beacon Club (269-343-9000)***

5830 Portage Road (3/4 mi. south of I-94 Exit 78), Portage, MI 49001

Schedule: 3:30-5:15 Seminar: (2 hours of Continuing Professional Education)
5:45: Irish Dinner Buffet (includes salad, rolls, dessert, beverage)
6:30: Speaker (1 hr of CPE)

___ Seminar: \$25.00 or ___ Dinner: \$25.00 or ___ (Discounted) combined: \$40.00

Name of Attendee _____

Company Name _____

Address _____ IMA # _____

Phone _____ Email _____

Reservations -To Mark Woodin: mark.woodin@theima.org or mail form with check for IMA to Mark Woodin at 8643 Newhouse St., Portage, MI 49024 (269) 323-2246

**SPRING PROFESSIONAL DEVELOPMENT SEMINAR
GRAND RAPIDS & KALAMAZOO CHAPTERS
April 21, 2009
DAVENPORT UNIVERSITY – GRAND RAPIDS**

**“THE GLOBAL ECONOMY, ACCOUNTING ISSUES
AND RESOURCES”**

(TENTATIVE) AGENDA

- 8:00 - 8:30 Registration Continental Breakfast
- 8:30 - 9:30 Keynote Speaker: Don Grimes, Senior Vice-President,
Chief Financial Officer of Wolverine World Wide, Inc.
“Wolverine World Wide’s International Growth”
- 9:30 - 10:30 Speaker: Sonja Johnson, Executive Director,
Van Andel Global Trade Center of GVSU
“Challenges/Opportunities Doing Business Globally”

10:30 - 10:45 Morning Break/Snacks

- 10:45 - 11:45 Speaker: Tom McQuire, Office Director / International Trade
Specialist - U.S. Department of Commerce, U.S. Commercial
Service
(Resources / Assistance from State and Regional Sources)
- 12:00 p.m. Lunch Session Speaker: Christine Lucy, Executive VP of Robert Half
(Global Financial Employment Monitor 2008-2009)
- 1:30 - 2:45 Speaker: Sanjay Dutta, Vice President of Operations, Cascade
Engineering, Inc.
(Ethics)

2:45 - 3:00 Afternoon Break

- 3:00 - 4:30 Speaker: Bobbe Barnes, Director of BMB Enterprises
“IFRS – Here it Comes”
- 4:30 - 4:45 Conclusion/Business Card Exchange

Contact: Lisa Hern Register by Phone (616) 308-5433
Grand Rapids Chapter – IMA Register by Email alea_va@earthlink.net
Register On-line with Acteva at <http://www.acteva.com/go/imagr>

Cost: In advance----- Members - \$85.00 Non-members - \$95.00
At the door----- Members - \$110.00 Non-members - \$120.00
(Advance registration payment may be made at the door)

2008-2009 Kalamazoo Chapter Board of Directors

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VP Membership and Community Service	Karyn Walker	karynw@theima.org	VP Membership and Community Service

---- PRESIDENT'S MESSAGE----

The Kalamazoo Chapter has long recognized the challenge of providing our members with excellent educational speakers and opportunities to network with others in the accounting and finance functions. In order to determine how well we have done, we recently sent a survey to all of our members that had provided us with email addresses. I want to thank you for the time and effort that many of you took to respond to this survey and provided us with your comments on the value of the Kalamazoo Chapter of the IMA. We received suggestions from members regarding future topics for our meetings, the timing of the meetings and other comments that the Board of Directors will be evaluating during the planning sessions as we prepare for next year. We also recognize that in this economic climate we must control the costs of our events so that you will be able to take advantage of these opportunities.

As you will see in this newsletter, we are again offering an Ethics seminar in March that will provide our members with 2 hours of continuing professional education. Our April meeting will be our all day joint meeting with the Grand Rapids Chapter and will focus on the impact of the global economy with nationally known speakers from Wolverine World Wide, experts in the new IFRS standards and governmental resources on doing business in a global economy. I hope you are able to take advantage of our remaining events for this year. We are not planning a May event this year but the Board will be meeting over the summer to bring you more educational speakers and events starting in September.

The Board strives to provide our members with activities and educational opportunities to meet the challenges that your careers require. In addition, the IMA offers free educational seminars via a monthly webinar to its members. I want to thank you for your membership in the IMA and encourage you to participate in the Chapter's activities as your time permits.

Dana Collins, Chapter President

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Our knowledge of where to do it.

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KFORCE
PROFESSIONAL STAFFING

Webinar Programs for IMA Members

IMA webinars – Online seminars to engage IMA members in emerging areas and/or new aspects of practices within the management accounting profession.

Upcoming Calendar of Events

Air Date	Series	Session Title (click to register)
March 12	Inside Talk	The 2009 Job Market & You

Inside Talk monthly webinars are recorded and available 3-5 business days after the live event. **To view a recording of a past event, visit the [Webinar Library](#).**



What did you think?

Our IMA Chapter roster was distributed online recently, to save the cost of mailing. Do you like receiving it that way? Please contact Karyn Walker if you didn't receive it, or if you would like a CD mailed to you. We aim to please!!

We are currently forming next year's Board of Directors and would like some fresh new faces and ideas to help us plan next years programs. The board meets for about an hour once a month. The Chapter understands that most members are already pressured for time but would like to ask you to give us a little of it. Please contact our current President, Dana Collins, or our future President, Mark Woodin to discuss how you can contribute to the success of your local Chapter of the IMA.

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**Kalamazoo Chapter
March/April 2009 Newsletter**



LOCATION FOR MARCH MEETING - Beacon Club in Portage

LOCATION FOR APRIL ALL DAY SEMINAR -
Davenport University in Grand Rapids