

IMA CAROLINAS COUNCIL ANNUAL WINTER CONFERENCE



The Association of
Accountants and
Financial Professionals
in Business

Hosted by the IMA Charlotte Chapter
Co-sponsored by the IMA Carolinas Council

**Friday, February 5, 2016
12:00 pm – 4:30 pm**

**Johnson and Wales University
801 West Trade Street
Charlotte, NC 28202**

**Doubletree by Hilton Charlotte
895 West Trade Street
Charlotte, NC 28202**

4 Continuing Professional Education Credits*



*The IMA Carolinas Council is registered with the National Association of State Boards of Accountancy (NASBA), as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors 150 Fourth Avenue North, Suite 700, Nashville, TN 37219-2417.

Web site: www.nasba.org.

This program meets the ICMA guidelines for CPE credits for CMAs and CFMs. It is qualified CPE for CPAs also.

Conference Location Directions (Johnson and Wales University and the Doubletree are located within the same complex):

From I-77 traveling south take Exit 10B. Continue approximately 2 blocks. Johnson and Wales and the Doubletree will be on the right. If staying at the Doubletree pull into the complex driveway and park in the hotel parking deck. If only attending the conference or other activities continue one more block to Cedar St. and turn right. Park in the Cedar St. Parking deck (free parking cards will be available at registration).

From I-77 traveling north take Exit 10. Turn right. Continue approximately 2 blocks. Johnson and Wales and Doubletree will be on the right. If staying at the Doubletree pull into the complex driveway and park in the hotel parking deck. If only attending the conference or other activities, continue one more block to Cedar St. and turn right. Park in the Cedar St Parking deck (free parking cards will be available at registration).

Hotel Information:

The group rate for a Deluxe King N/S room is \$119.00. Reservations may be made directly via the internet at: http://doubletree.hilton.com/en/dt/groups/personalized/C/CLTWCDT-INS-20160205/index.jhtml?WT.mc_id=POG

PLEASE NOTE: Room reservations must be made no later than January 3, 2016.

Conference Registration Information:

Registration begins at 12:00 pm and the first seminar begins at 12:30 pm. The last session will end before 4:30 pm. Food will be available at registration and during session breaks. Register on line (see registration form) or by completing the registration form at the end of this flyer and mail to:

Charlotte IMA
PO Box 32291
Charlotte, NC 28232-2291

All registrations must be received by February 1, 2016. Registrations will be available at the door for the Conference only.

The cost for the Conference is \$110. The cost for the Conference and the Friday evening dinner is \$130.

Free Optional Tour:

There will be a no cost tour of the Culinary School of Johnson and Wales University at 4:45 pm. Please meet in the hotel lobby by 4:40 pm.

Friday Evening Dinner:

The event will be at the Doubletree. Social hour will be from 5:30 pm to 6:00 pm. Dinner will begin at 6:00 pm. The cost is \$30 per person. Spouses and guests are welcome. The Carolinas Council will host past Council Presidents and present the Kinsey Jenkins award at this dinner.

Saturday Morning Council Meeting:

The Carolinas Council Meeting will be from 8:30 am to 12:00 pm. Breakfast will be available starting at 8:00 am at no cost to attendees. All IMA members are welcome and encouraged to attend.

Conference Schedule and Presenters:

Session 1: 12:30 pm – 1:20 pm

CPE Credit: 1 hour

Danny Shaw-Cyber Security

This session will try to answer the question “Are You Really Covered?”

Session 2: 1:30 pm – 2:20 pm

CPE Credit 1 hour

Steve Casey-Affordable Care Act

This session will cover employer reporting requirements and compliance options.

Session 3: 2:30 pm – 3:20 pm

CPE Credit: 1 hour

Brent Dees-Dodd-Frank

This session will cover 401K and pension plan liabilities to the company sponsor and fiduciary responsibilities to plan participants.

Session 4: 3:30 pm – 4:20 pm

CPE Credit: 1 hour

April Simpkins-Affordable Care Act

This session will cover dealing with the ACA and Dodd-Frank Act for companies (from the trenches) with examples of companies navigating the acts.

Conference Speakers Biographies:

Danny Shaw is a CDP, PMP, and HISP, and has over 25 years' experience in technology and security risk management. Danny has provided technology services to companies including the largest professional services firm in the world, a fortune 500 company, industries including banking, manufacturing, insurance and healthcare over that period. He is the National Practice Leader, IT Risk Advisory Services for Experis Inc. Danny and his teams focus on risk management and process improvement for business systems solutions, information security, and Privacy compliance.

Steve Casey is currently with True Benefit, and helps businesses create sustainable employee benefit solutions while navigating the ever-changing landscape of Healthcare Reform. Steve's goal is to simplify the complexities of employee benefits in today's environment, allowing his clients to keep their focus on what drives their business.

Brent Dees has been advising business owners and senior leaders for over 40 years. Since 2004 through his company, Focus Four, he has helped business owners navigate the many risks that jeopardize success. Through his work as a Registered Representative for Cambridge Investment Research, Inc., he is currently focused on pension plans and Dodd-Frank.

April Simpkins is the President of HRS&S Consulting, LLC. A company focused on providing Human Resources services to small and medium sized organizations. She is a nationally certified Professional in Human Resources with 20 years of Human Resources experience. Her areas of expertise include: compliance, workforce planning, executive compensation, succession planning, leadership development and creating HR related training programs.

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Registration Instructions

Friday, February 5, 2016 12:00 pm – 8:00 pm
Saturday, February 6, 2016 8:00 am – 12:00 pm

Register and Pay online at <http://www.ima-charlotte.org/events/view/68/ima-carolinas-council-annual-winter-conference>

OR

Complete this form and mail to the address below along with a check payable to IMA Charlotte:

Charlotte IMA
PO Box 32291
Charlotte, NC 28232-2291

Name:
Title:
Company:
Street Address:
City, State, Zip Code
Phone:
E-mail address:
IMA Chapter (if applicable):
IMA Member Number (if applicable):
<input type="checkbox"/> Conference Only \$110
<input type="checkbox"/> Conference and Dinner \$130
<input type="checkbox"/> Dinner Only \$30 Number_____
<input type="checkbox"/> Dinner Past Council President No Charge
<input type="checkbox"/> Dinner Past Council President Spouse or Guest \$30
<input type="checkbox"/> Tour No Charge
<input type="checkbox"/> Saturday Morning Council Meeting No Charge