



The Association of
Accountants and
Financial Professionals
in Business

IMA Carolinas Council Spring Conference

HILTON MYRTLE BEACH RESORT
APRIL 27-28, 2017

Catch A New WAVE
NEW IDEAS, NEW CONTACTS, NEW DIRECTION



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

General Conference Information

- This is the 46th annual spring conference in Myrtle Beach, and our 3rd year at the Hilton Myrtle Beach Resort.
- The Carolinas Regional Council (later Carolinas Council) was founded in 1971 when there were nine chapters in the two Carolinas with approximately 2,000 members. It was the first Council of the twenty-four Councils in the Institute of Management Accountants (IMA) and was chartered in 1975
- 16 hours of CPE is offered over two days, including 2 hours of ethics.
- Top notch speakers including Rick Thompson, Ted Kazaglis, Keri Cole, former chapter presidents and other renowned business individuals within the industry.
- The opportunity to expand your professional network by attending the sessions and socializing with other business professionals from the Carolinas and surrounding areas.
- Unique blend of tradition and innovation. Designed to help accounting and finance professionals develop the key competencies needed to become strategic partners within their enterprise
- **Hilton Myrtle Beach Resort** is once again our host hotel. It offers spectacular views in both the guest rooms and main conference rooms. It has an outdoor pool, fitness facility and the Royale Day Spa.

Registration Information

Registration is now OPEN for the 2017 Spring Conference

Please visit the website below for hotel and speaker information. We will be updating the site and this brochure as information becomes available so please visit often.

www.regonline.com/carolinascouncil2017

Conference Chair

Mike Billings

Mike.Billings@Hyster-Yale.com

252-295-9732

The 2017 packages are as follows**:

- All sessions and meals both days - \$395
- Thursday session and meals - \$220 (Breakfast, Lunch)
- Friday sessions and meals - \$240 (Breakfast, Lunch, Dinner)
 - Students – All sessions and meals both days - \$150
 - Students - Thursday **OR** Friday sessions and meals - \$80

Conference Co-Chair

Jamie Long

jlong@mriraleigh.com

919-818-0044

Additional meal tickets may be purchased during the registration process. (Breakfast \$15; Lunch \$20; Friday Social \$50. Reduced prices for children.

**Please note, for special conference rate pricing or other matters, please contact Conference Chairs

CANCELLATION POLICY

If cancelled at least 72 hours before the event, the registration will be reimbursed 100%. If cancellation occurs after that time, reimbursement will be for the CPE hours but not the meals that were purchased. Emergency situations are reimbursable in full.

If you have any questions please contact Mike Billings or Jamie Long.

Contact Information below

Conference Chair-Mike Billings – Mike.Billings@Hyster-Yale.com (252-931-5415)

- Conference Co-Chair-Jamie Long – jlong@mriraleigh.com (919-818-0044)

COMPLAINT POLICY

Please contact Mike Billings or Jamie Long with any problems, concerns or complaints about the conference event. Their contact information is below. Conference evaluation forms will be provided the day of the event.

Contact Information below

Conference Chair-Mike Billings – Mike.Billings@Hyster-Yale.com (252-931-5415)

- Conference Co-Chair-Jamie Long – jlong@mriraleigh.com (919-818-0044)

Lodging Information

Hilton Myrtle Beach Resort
1000 Beach Club Drive
Myrtle Beach, SC 29572-5304

Hotel Prices – 3 Hotel Options at the Hilton Resort – all are close or at the Hilton Hotel where the conference rooms will be located. Free Parking

Hilton Honors members receive free in-room Wi-Fi. (Please join Honors before the event)

[Hilton Hotel Reservation Link- Click Here](#)

- \$135 Ocean View Guest Rooms at the Hilton Hotel
- \$137 1 Bedroom Condo – Royal Palms
- \$252 2 Bedroom Condo – Royal Palms
- \$154 1 Bedroom Villa – Kingston Plantation
- \$204 2 Bedroom Lodge – Kingston Plantation

➤ **Reduced rates are available until April 6, 2017**



Conference Agenda

Breakfast served daily starting at 7:00 am, first speakers will begin at 8:00 am

Thursday, April 27th

Start	Finish	CPE Credits	Speaker Name	Title	Topic/Field of Study	Program Level	Prerequisites	Advanced Preparation	Delivery Method
7:00	8:00			Breakfast					
8:00	9:40	2.0	John Braush	The New Lease Accounting Rules	Specialized Knowledge & Applications	Intermediate	None	None	Group Live
9:40	10:00			Mid-Morning Break					
10:00	11:40	2.0	Mary Paramore/Wayne Washington	Millennials in the workplace	Personnel/HR	Basic	None	None	Group Live
11:45	12:45			Lunch					
12:50	2:30	2.0	Toni Spina	New Federal Tax Proposals	Specialized Knowledge & Applications	Basic	None	None	Group Live
12:50	2:30	2.0	*Breakout - Holly Sullenger	Excel Power BI (Business Intelligence) Tools	Computer Software & Applications	Intermediate	None	None	Group Live
2:30	2:50			Break					
2:50	4:30	2.0	Bernie Livers	New Developments with Employee Health Centers	Specialized Knowledge & Applications	Basic	None	None	Group Live
		8.0							



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

Conference Agenda

Breakfast served daily starting at 7:00 am, first speakers will begin at 8:00 am

Friday, April 28th

Start	Finish	CPE Credits	Speaker Name	Title	Topic/Field of Study	Program Level	Prerequisites	Advanced Preparation	Delivery Method
7:00	8:00			Breakfast					
8:00	9:40	2.0	Rick Thompson	Ethical Decision Making: Right Choices in Today's Business Environment	Behavioral Ethics	Basic	None	None	Group Live
9:40	10:00			Mid-Morning Break					
10:00	11:40	2.0	Ted Kazaglis	Employment Law Update	Business Law	Basic	None	None	Group Live
11:45	12:45			Lunch					
12:50	2:30	2.0	Keri Cole	The Partnership Between Finance and Manufacturing	Specialized Knowledge & Applications	Basic	None	None	Group Live
2:30	2:50			Break					
2:50	4:30	2.0	Bob Drach	Case Study of an ERP implementation with a focus on integrated Management Accounting.	Specialized Knowledge & Applications	Basic	None	None	Group Live
		2.0	*Breakout - Stephen Head	IT Audit Update	Specialized Knowledge & Applications	Basic	None	None	Group Live



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

Conference Learning Objectives

Speaker Name	Title	Learning Objective
John Braush	The New Lease Accounting Rules	Develop a better understanding of how the New Lease Accounting Rules
Mary Paramore/Wayne Washington	Millennials in the workplace	Develop a better understanding of the challenges of managing a successful Millennial workforce
Toni Spina	New Federal Tax Proposals	Develop a better understanding of the current Federal Tax Proposals before Congress
*Breakout - Holly Sullenger	Excel Power BI (Business Intelligence) Tools	Develop a better understanding of the New Data Analysis tools available in Excel
Bernie Livers	New Developments with Employee Health Centers	Develop a better understanding of the business model and economics of on-site healthcare centers
Rick Thompson	Ethical Decision Making: Right Choices in Today's Business Environment	Recognize how we can learn to avoid ethical lapses and remain focused on doing the right things right in our organizations and in our dealings with others.
Ted Kazaglis	Employment Law Update	Develop a better understanding of recent and upcoming changes to the labor law environment
Keri Cole	The Partnership Between Finance and Manufacturing	Develop understanding of challenges and skill needed to optimize team work between finance and manufacturing professionals
Bob Drach	Case Study of an ERP implementation with a focus on integrated Management Accounting.	Develop a better understanding of the impact of an ERP implantation on Integrated Management Accounting.
*Breakout - Stephen Head	IT Audit Update	Develop a better understanding of recent trends in auditing IT systems

Social Events

- ***Friday Conference Celebration at the Hilton Resort***
 - For attendees and their families (please see Registration information page for meal prices for family members)
 - There will be kids activities
 - Games/Activity

Speaker Bios



John M Brausch, CMA,CFM,CPA

- John Brausch is President of J Brausch and Company, a consulting firm specializing in process analysis and improvement, data governance, financial and operational reporting and solving accounting and ERP issues. Since beginning this venture in 2011, John has worked with firms in New York, Chicago, Dallas and San Antonio.
- John is a graduate of The Citadel and earned an MBA from The University of Montana. He is a CMA, CFM and CPA.
- John is a former Chair of IMA and a former Chair of the Board of Regents of the ICMA. John served on the ICMA's exam review committee and for the Board of Regents from 1994 through 2003, served as Chair of IMA's Audit and Oversight committee in 2005 and 2006, and then served as Chair of ICMA's Board of Regents from 2006 through 2008. In 2008, John was elected IMA's Chair-elect in 2008 and served the IMA in the Chair's role through 2011.
- He is a Lybrand Winner for his 1994 *Management Accounting* article: "Target Costing for Profit Enhancement." He has written two dozen articles for *Management Accounting* and *Strategic Finance* magazines; the most recent a book review of The FASB: the People, the Process and the Politics for January's issue.
- John is a former officer of the Carolina's Council; and a former member of more IMA chapters than he can count, including the Western Carolina's, Piedmont-Triad, Charlotte, Western Montana, Richmond and Myrtle Beach chapters. He is currently a member of the Greater Columbia Chapter where he and his wife, Pennie, reside.

Speaker Bios (cont)



- **Keri Cole, CMA, CPA**
- Keri Cole is currently the Chief Financial Officer of Caterpillar's Building Construction Products Division headquartered in Cary, North Carolina.
- Prior to assuming her role as CFO last year, Keri held various other positions within Caterpillar – she was a Business Support Manager for three different product groups - Marine Engines, Skid Steer Loaders and Compact Construction Equipment, and a Product Manager for Compact Loaders.
- In 2016 Keri completed Caterpillar's Executive Leadership Program, Digging Deep, which was developed in partnership with Duke University, and is a twelve month project based course to train future leaders.
- Keri is a CPA and a CMA, and started her career working with small business clients in public accounting. She transitioned to industry relatively early in her career, and has worked in various accounting roles, as well as internal audit at Dana Corporation.
- She holds a bachelor's degree in accounting from the University of Alabama at Huntsville, and a master's degree in accounting from the University of Tennessee, Martin.
- Keri is a member of the IMA, AICPA and NCACPA.

Speaker Bios (cont)



- **Bob Drach, CMA**
- Bob Drach is the president of a custom building materials company. He is a Certified Management Accountant (CMA) and also holds professional certifications from the American Production and Inventory Control Society (APICS) and the Turnaround Management Association (TMA).
- As a consultant with Deloitte, Bob authored several articles on manufacturing strategy and the use of information systems to implement strategy. 20 years later, Bob acquired a company that competes on the basis of service and lead-time, then set about to build an information system to support that strategy.

Speaker Bios (cont)



Stephen W. Head, CPA, CMA

- **Stephen W. Head** – Mr. Head has over thirty-five years of audit and technology experience spanning a variety of industries ranging from banking and insurance to manufacturing, energy, and government. Stephen is a CPA, CGMA, CMA, CISA, CISM, CGEIT, CRISC, CISSP, CBCP, CFE, CHP, CHSS, CITP, CPCU, MCSE, and a MBA. As a Senior Manager with Experis Risk Advisory Services, Stephen provides practical, relevant guidance to Internal Audit Departments, helping them meet the challenges of today's rapidly changing environment.
- Stephen has published widely on the subject of auditing. He co-authored the AICPA's *Statement on Auditing Standards No. 94* and is the author of the internationally recognized *Internal Auditing Manual* as well as *Practical IT Auditing*, both published by Thomson Reuters. He has been prominently featured in the *Journal of Accountancy* and other national and international periodicals.
- Stephen served for two terms as the International Chair of the ISACA Standards Board and was the Editor of ISACA's *CISA Review Manual* from 2003 to 2011. He also served on the AICPA National Accreditation Commission and was a member of the AICPA Information Technology Executive Committee.

Speaker Bios (cont)

Ted Kazaglis, J.D.



- Mr. Kazaglis is Office Managing Principal of the Raleigh, North Carolina, office of Jackson Lewis P.C. He handles a range of employment law issues with a particular focus on the alternative staffing industries, including professional employer organizations and temporary staffing
- For over 20 years, Mr. Kazaglis has represented professional employer organizations throughout the United States focusing on a wide array of issues affecting the co-employment relationship. Reflecting his involvement in the staffing industries, Mr. Kazaglis is an active member of the National Association of Professional Employer Organizations (“NAPEO”). He is regularly published in the *PEO Insider*, the premier publication directed specifically to the PEO industry. Mr. Kazaglis has also been a featured speaker at several NAPEO Legal and Legislative Conferences and NAPEO annual national conferences. Mr. Kazaglis has published Legal Reviews specific to the PEO industry.
- Education: University of Akron School of Law J.D., 1987
Kent State University B.B.A., 1984
Cum Laude
Accounting

Speaker Bios (cont)



- **Bernie Livers**
- Bernie Livers was named the Vice President of Sales and Marketing for CareHere in November 2010 and has led a national sales organization establishing distribution channels throughout North America for CareHere's products and services.
- Bernie brings over 30 years of sales management experience to CareHere having formerly functioned as senior sales executive for Rochester based Paychex, Inc. from 1996 thru 2010 and prior to that he held a position as national sales director for Primerica, Inc. from 1984 thru 1996.
- He earned his Bachelor of Science degree from the University of Kentucky and currently resides with his family in Nashville, Tennessee.

Speaker Bios-Mary Paramore/Wayne Washington



- **Mary Paramore, M Ed**

- Currently Learning and Development Specialist for Hyster-Yale Group, Mary has been in Corporate Learning and Development for over 20 years with her experience concentrated in Leadership, Team Development and Customer Service, Strategic Planning and HR policies.
- Mary is a sought-after speaker for many organizations and professional associations, having experience with facilitation and consulting in the utility industry, manufacturing, healthcare, education, pharmaceuticals, and government agencies. She holds a variety of facilitator qualifications including those from Ken Blanchard Company, Franklin Covey, Fierce, Inc, Partners in Leadership, Inscape and Customer Focus.



- **Wayne Washington**

- Wayne is currently the HR Manager for the Warehouse Product Development Center of Hyster-Yale Group. – A global material handling company with revenues of over 2.6 billion
- Wayne is a graduate of Michigan State University and currently resides in Greenville, NC.
- Wayne currently serves on the Board for the Greenville Museum and also the STEMEast advisory board. He possesses over 23 years of Human Resources experience and has sat on over 15 boards and committees.
- In his role he provides expertise in the areas of employee relations, performance management, talent acquisition and management, compensation/benefits, etc. Wayne is also responsible for the HR integration with the firm's development site in Masate Italy. Prior to joining Hyster-Yale Group, Wayne worked in various HR roles in the pharmaceutical, banking, consulting and automotive industries.
- Wayne is also a motivational speaker (primarily youth) under his company DUB-CO LLC. He has spoken at over 300 events in the last 15 years.

Speaker Bios (cont)



- **Antoinette Spina, CPA**
- Toni received her Bachelors of Science Degree in Accounting from the State University of New York at Fredonia in 1981. She became a Certified Public Accountant in 1984 and has over 40 years experience in Taxation and Small Business Advisory. She is currently a manager/shareholder at Bailey, Carr CPAs P.C.
- She is a member of the American Institute of Certified Public Accountants and is a past president for the Rochester Chapter of the New York State Society of Certified Public Accountants. Toni was a member of the state level committee for Bankruptcy and Insolvency Issues as well as the statewide committee for the Careers Opportunities in the Accounting Profession Committee. She has served on a local, statewide and global level for the Institute of Management Accountants. Toni just completed serving 6 years on the global board of directors as a vice president. She is the former Chairperson for the Performance Oversight and Audit Committee for the global board. Toni is a past president of the Rochester Chapter as well as a 5 year term past president of the NY-Ontario Regional Council. She is a founding faculty member of the IMA Leadership Academy. In June of 2014 she received the IMA Exemplary Volunteer Award at the IMA's Annual Conference in Minneapolis
- Toni is a frequent speaker on various tax issues for a variety of professional organizations across the United States including the Monroe County Bar Association where she served as a non-attorney member of the bankruptcy committee for 6 years. She is a frequent speaker for Rochester Channel 8 morning news show on various tax topics and is often quoted in the Rochester Democrat & Chronicle as a tax specialist. She was a speaker at the IMA's Global Conference in June of 2013 in New Orleans. She regularly speaks at IMA chapter events and several IMA council conferences all over the United States.

Speaker Bios (cont.)



Holly A. Sullenger, M Ed, ABD PhD

Holly describes herself as a knowledge broker. She currently works as the Assistant Director for NC State University's Technology Training Solutions, a unit within the Division of Continuing and Professional Education. Her unit delivers both technology and professional development courses to members of business and industry who need additional knowledge to get ahead in their fields.

Holly is also a sought-after speaker for many organizations and professional associations, having done both technical and professional training for over 25 years. During that time, she also managed five different training centers, provided business software solutions to corporations across the country, and still runs her own consulting business. Holly specializes in the Microsoft products, and is known for her Excel Tips and Tricks seminar, which is sold-out each time it runs.

Holly believes strongly in the benefits of participating in lifelong education. She is currently in the dissertation phase of PhD studies in Adult Education at NC State University. Her previously earned degrees in Adult Education, Business Administration, Computer Science, and Liberal Arts, work together to provide Holly with a diverse knowledge base and an uncanny ability to connect with her audiences.

Speaker Bios (cont)



- **Rick S. Thompson, Sr. VP Finance, Secretary and Treasurer**
- Pacolet Milliken Enterprises, Inc. Rick Thompson is the Sr. VP Finance, Secretary and Treasurer of Pacolet Milliken, a privately held real estate, energy and investment company headquartered in Greenville, SC. Previously, he served as Chief Financial Officer of this rapidly growing Company for nine years.
- Prior to joining Pacolet Milliken, he was a 28 year associate of Milliken & Company where he assumed a number of significant roles including Corporate Director for Product Management Improvement, Finance Team Leader for Enterprise Resource Planning, Manager of Global Systems Integration, Financial Reporting Manager, Corporate Cost Manager and Industrial Engineer at five different manufacturing locations.
- In 1997, Mr. Thompson completed Duke University's Advanced Management Program. He holds a Master of Accountancy degree from Gardner-Webb University, is a Certified Management Accountant, Certified Financial Manager, Certified Public Accountant (CPA - licensed in NC), Certified Internal Auditor, Certified Treasury Professional and a Certified Fraud Examiner. Mr. Thompson is also a Distinguished Toastmaster.
- He has served as President of the Carolinas Council of the Institute of Management Accountants and currently serves on IMA's Global Board of Directors. Mr. Thompson is the past Chair of the Board of Regents of the Institute of Certified Management Accountants. He was awarded IMA's 2015 Exemplary Leadership Award.

Thank You to our Sponsors

