



The Association of
Accountants and
Financial Professionals
in Business

DAYTON CHAPTER



The

April, 2024

Balance Sheet

VOL. 97, NO.11

DAYTON CHAPTER

Please consider an opportunity on the Dayton Chapter Board

FIRST SESSION SPEAKER

April 16, 2024
5:30 p.m. – 6:30 p.m.
Engineers Club

Phil Ratermann
FastLane, Executive Director

Life in the FastLane- Improving Competitiveness



Prior to launching FastLane, Phil spent more than 25 years in manufacturing. He was engaged in new product development for more than a decade, and then served as VP/GM for 12 years, with P&L responsibility for 3 brands and 6 facilities across North

America. Phil's experience developing individuals and teams who deliver business growth, allows him to relate quickly with client companies. Ratermann has a Bachelor's degree in Mechanical Engineering and a MBA from the University of Dayton.

About FastLane:

FastLane is a team of unbiased manufacturing advisors finding the right solution to their client's biggest challenges. As a fee-for-service, nonprofit, Fastlane provides services to small and medium-sized manufacturing firms to help them improve their operations, grow sales, and create jobs. Their services include continuous improvement, assisting in the adoption of advanced manufacturing technologies, workforce development, engineering services and business/culture solutions.

FastLane is the Dayton region's Manufacturing Extension Partnership (MEP) center and part of the MEP National Network. Their office is located within the University of Dayton Research Institute. Since 2013, FastLane has improved the competitiveness of more than 700 Ohio manufacturing companies.

SECOND SESSION SPEAKER

April 16, 2024
7:30 - 8:30 p.m.
Engineers Club

Beth Handwerker, CFP, JD, CDFA
James Investment Research

Planning a Legacy

Beth is a Financial Planner who also specializes in estate planning. She helps clients walk through creating estate planning documents that helps make things as easy as possible for those left behind. Beth believes that the documents are only part of the estate planning process. She also explores preparing your heirs for wealth.



A fun part of the process for Beth is documenting family stories, recipes or history that you want to ensure aren't forgotten. Estate planning is more than just the transfer of wealth. Beth also wants to transfer wisdom, a legacy.

Beth is passionate about estate planning because she's seen the effects of bad planning with her own family. Her mother passed away, and their family ran into some issues with property titling. One issue caused her father to open probate in a separate state because a timeshare did not have the correct ownership.

The other situation involved a property that was never moved from her mother's ownership to her family's partnership ownership.

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



President's Message



It feels like it's been a busy month. I hope you were able to take a break and enjoy the eclipse. We had wonderful conversations last month at the dinner meeting as part of the Ethics Case presentation. Thanks to Gregg Woodruff for bringing some of his students to add to the dialog.

This month, we are back to our two speaker format, with some informative opportunities for you. First, we have Phil Ratermann, who as Executive Director of FastLane will be telling us about the role of the organization and how they help companies with process improvement. After dinner, we are pleased to bring back Beth Handwerker, CFP, to share her presentation on "Planning a Legacy", giving us direction and insight on dealing with transitioning assets and wealth to the next generation.

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.

See the newsletter for our next Social Outing on Friday, April 26th at On Par Entertainment.

Paul Myers
Chapter President

Dayton IMA –April Social Outing On Par Entertainment



When: Friday, April 26th, 2024 6:00 p.m.

Where: On Par Entertainment

4464 Indian Ripple Rd, Dayton, OH 45440

Why: To have a good time; network with fellow members

Who: You as well as guests are welcome!

Rsvps are encouraged to insure seating, you can let us know if you are coming at
dayton@imachapter.org

<https://onparbar.com/>

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

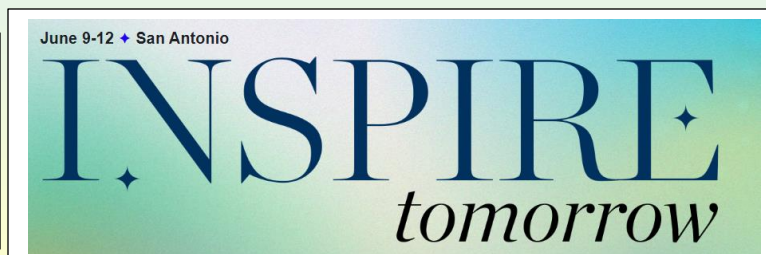
The Chapter Fresh ideas for programs and local presentations and events and insight for improved administration

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

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

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.

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**Considering the CMA?
Don't Miss This Webinar**

**The CMA Exam: Test-Taking Tips &
Strategies**

**Tuesday, April 18, 2024 from 12 p.m. to 1 p.m.
(EDT)**

Success on the CMA exam requires knowledge, time management skills, an understanding of how the exam is graded, and insight into what to expect at the testing center. This webinar will focus on helping you prepare for your CMA testing experience.

Areas to be covered include:

- Effective study approaches
- Time management strategies
- Exam grading guidelines
- Prometric Testing Center experience

If you're ready to take your career to the next level, ENROLL in the CMA program today!

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

Southwest Ohio ACFE Chapter

APRIL 2024 IN-PERSON CHAPTER APPRECIATION/MEET & GREET/1CPE: MOERLEIN LAGER HOUSE

When: Thursday, April 18, 2024 5:00 PM - 7:30 PM

Venue Info: Moerlein Lager House, 115 Joe Nuxhall Way. Parking is available in the Central Riverfront Garage, 124 E Mehring Way (\$9 for 2 hours / \$13 for 3+ hours).

Timing: We will have networking from 5-5:45. The presenter will speak from 5:45-6:45, and then networking will resume until 7:30.

Speaker: Dirk Halscheidt, Postal Inspector – Cyber Crimes, Financial Crimes, & Money Laundering - United States Postal Inspection Service

Topic: Overview of the United States Postal Inspection Service and Current Trends
This presentation will cover what areas of criminal activity that USPIS investigates. In addition, we will cover the current trends of criminal activities to include mail theft, check fraud, and the use of social media such as Telegram to facilitate the crimes.

CPE: 1 hour

CPE credits are based on a 50-minute hour. CPE is offered through the ACFE as well as the Accountancy Board of Ohio (sponsor number CPE.00467). Attendees must attend 50 minutes of the actual presentation and sign in at the meeting to validate attendance.

Learning Objectives: Promotion of improved fraud detection and deterrence and through expansion of knowledge in relation to the session's topic.

Prerequisites: None

Southwest Ohio ACFE Chapter members can register for free. We welcome non-members and guests to also attend for \$15.

Announcing the New Global IMA Career Center



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

UPCOMING WEBINAR SCHEDULE

INSIDE TALK

Ending Month-End Madness: Turn Messy Transactional Data into “Beautiful” Journal Entries

Wednesday, April 17, 2024 from 1:00 p.m. to 2:00 p.m. (EDT)

Field of Study – Accounting– Reporting & Control

Accounting professionals often face the challenge of month-end close, a recurring task that involves transforming messy, incomplete transaction data into balanced journal entries. This process can be tedious and manual, often compounded by the added pressure of audits.

Join Cody Leach from Leapfin as he delves into the reasons why transaction data from payment service providers can be problematic and disorganized. Learn practical tips and explore technologies that can streamline this typically frustrating process, making it faster, more accurate, and more reliable for your teams.

AI-Powered Business Intelligence: Shaping the Future of Accounting & Finance

Wednesday, April 24, 2024 from 1:00 p.m. to 2:00 p.m. (EDT)

Field of Study – Information Technology– Technology & Analytics

Looking to harness the power of AI and machine learning (ML) in daily operations? In today's rapidly evolving business landscape, data-driven decision-making is crucial for financial success. Explore how business intelligence, equipped with cutting-edge AI and ML advancements, can transform the way companies analyze, interpret, and leverage financial data for smarter, more informed decisions. Join Stephen Wolff from Myers-Holum to gain actionable insights into the latest advancements in AI and machine learning, and how they empower accounting and finance professionals to streamline processes, enhance accuracy, and achieve a competitive edge.

CAREER CONNECTION

Build Your Personal Brand with AI

Monday, April 29, 2024 from 1:00 p.m. to 2:00 p.m. (EDT)

Field of Study – Personal Development – Leadership

Imagine standing at the forefront of a revolution, where AI reshapes our world and your career. It's not just about the future; it's about your future. The reality is this: "It's not AI that will be taking your job...but someone who knows how to use it might." The question is, which person will YOU be?

Discover how to harness AI to elevate your skills, enhance your personal brand, and attract opportunities, whether you're navigating the corporate world or building your own business.

This webinar is about more than just learning; it's an opportunity to gain valuable skills and knowledge to help you along your career journey.

Check out all IMA [Webinars Here](#)

BIOGRAPHY CONTINUED FROM PAGE 1

The mistake was discovered five years after her mother's passing while in the process of selling the property. This caused delays in selling the property and raised several tax questions.

It's very important to Beth that no one has to go through something like that. Part of the process at James is helping our clients transfer properties to the correct ownership to minimize any delays and headaches!