



Accounting & Financial Women's Alliance
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The Association of
Accountants and
Financial Professional
in Business

2017 EMPOWERING TODAY'S ACCOUNTANT SEMINAR PROGRAM

Friday August 25, 2017

Edward Jones Training Facility

8333 S. River Parkway Tempe, AZ 85284

Today's accounting and financial professionals are more than just number crunchers. They are business leaders creating a prosperous future for their company as well as their clients. This critical function requires a combination of strong technical and professional skills along with integrity and a supportive network of peers. Professional accounting and finance associations benefit their individual members as well as the entire professional community. They provide great resources for professionals on technical issues, support for ethical dilemmas, best practices and networking opportunities.

Take advantage of this opportunity to support your lifelong learning and support local professional associations. The Accounting & Financial Women's Alliance Mesa East Valley Chapter and the AZ Valley of the Sun Chapter of the Institute of Management Accountants are presenting this seminar to allow all accounting and financial professionals an opportunity to learn and connect with their peers. Support your profession and make a small investment in your career by joining the members of the AFWA and IMA for the 11th Annual Empowering Today's Accountant Seminar.

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SEMINAR AT A GLANCE

- 7:30-8:10** Registration, Breakfast and Announcements – Sponsored by George Rambow, Edward Jones and Ben Kunzler, JP Morgan Asset Management
- 8:10-9:00** Title: Financial Planning
Session 1 Speaker: Ben Kunzler & George E Rambow III
- 9:10-10:00** Title: 2017 Accounting Updates
Session 2 Speaker: Joyce Barden
- 10:10-11:00** Title: Gift & Estate Taxes
Session 3 Speaker: Yesenia Barraza Simmons
- 11:10-12:00** Title: Professional Networking Tactics for Success
Session 4 Speaker: Beth Golightly
- 12:00-12:40** Networking Lunch - Sponsored by Robert Half / Accountemps
- 12:40-1:30** Title: Fraud and Internal Controls
Session 5 Speaker: Theresa Valade
- 1:40-2:30** Title: Leadership Challenges
Session 6 Speaker: Lynn Moran & Denise Crane
- 2:40-3:30** Title: Collective Genius and Collaboration
Session 7 Speaker: Steve Mason
- 3:40-4:30** Title: 21st Century Finance
Session 8 Speaker: Justin Gillespie

CPE Materials Sponsored by DeVry University

SEMINAR SCHEDULE

7:30 a.m. – 8:00 a.m. Registration & Continental Breakfast sponsored by George Rambow, Edward Jones and Ben Kunzler, JP Morgan Chase

8:10 a.m. – 9:00 a.m.

Title: Financial Planning

Speaker: Ben Kunzler & George E Rambow III

Field of Study: Specialized Knowledge

Level of Knowledge: Overview

CPE Credit: 1 Hour

Learning Objectives and Program Content: This session will include the latest Guide to the Markets where Ben will share the updates on what is happening locally/nationally and its impact on the financial markets. George will finish the session with information on incorporating Long Term Care into your personal financial planning.

9:10 a.m. – 10:00 a.m.

Title: 2017 Accounting Updates

Speaker: Joyce Barden

Field of Study: Accounting

Level of Knowledge: Update

CPE Credit: 1 Hour

Learning Objectives and Program Content: An Accounting/SEC Update of “what is happening” in our world of accounting to include: Recent Accounting/SEC Updates and what’s new from the AAA (American Accounting Association). This presentation will include updates recently provided by the Accounting Experts of the FASB, SEC, PCAOB, and IFRS, etc.

10:10 a.m. – 11:00 a.m.

Title: Gift & Estate Taxes

Speaker: Yesenia Barraza Simmons

Field of Study: Taxes

Level of Knowledge: Basic

CPE Credit: 1 Hour

Learning Objectives and Program Content: Income tax may not be the only liability an individual has to pay to the IRS during their life time or after their death. This seminar will give you the basic information on Gift & Estate Tax. Did you know that the person giving the gift may have to pay Gift tax, not the person receiving the gift? And, that although the Estate exemption is historically high, there may be Estates who owe income tax?

11:10 a.m. – 12:00 p.m.

Title: Professional Networking Tactics for Success

Speaker: Beth Golightly

Field of Study: Communications and Marketing

Level of Knowledge: Overview

CPE Credit: 1 Hour

Learning Objectives and Program Content: This presentation will address why it is important to network and how to overcome common roadblocks. You will get tips to develop your elevator pitch and set a strategy for in-person and online networking. You'll also learn the best way to ask for assistance from your network.

12:00 p.m. – 12:40 p.m. Networking Luncheon – sponsored by Robert Half / Accountemps

12:40 p.m. – 1:30 p.m.

Title: Fraud & Internal Controls

Speaker: Theresa Valade, CPA

Field of Study: Auditing

Level of Knowledge: Overview

CPE Credit: 1 Hour

Learning Objectives and Program Content: This session will review current fraud statistics, ways to prevent fraud in your organization, recent IRS scams and fraud cases.

1:40 p.m. – 2:30 p.m.

Title: Leadership Challenges

Speaker: Lynn Moran

Field of Study: Personal Development

Level of Knowledge: Basic

CPE Credit: 1 Hour

Learning Objectives and Program Content: In this session, attendees will get hands on opportunity to work on challenging leadership situations they are struggling with at work, school or volunteer roles.

2:40 p.m. – 3:30 p.m.

Title: Collective Genius and Collaboration

Speaker: Steve Mason

Field of Study: Personal Development

Level of Knowledge: Basic

CPE Credit: 1 Hour

Learning Objectives and Program Content: Introduction to 3 technical guide IMA Strategic Finance articles for applying accounting skills and governance to innovation and creative problem solving. These 3 articles will be presented in separate one-hour CPE classes for IMA and non-IMA accountants. This session will bring an understanding to the range of definitions of innovation and the need for a collaborative culture.

3:40 p.m. – 4:30 p.m.

Title: 21st Century Finance

Speaker: Justin Gillespie

Field of Study: Finance

Level of Knowledge: Basic

CPE Credit: 1 Hour

Learning Objectives and Program Content: This session will focus on digital transformation and advanced analytics and the effects on the finance function.

SPEAKER BIOGRAPHIES

Benjamin L. Kunzler, Executive Director, is a Client Advisor for J.P. Morgan Asset Management. With 15 years of industry experience, Ben has spent the last twelve years in this role with JP Morgan covering Arizona, New Mexico and Las Vegas. Before that, Ben worked at both Voya Financial and UBS in Scottsdale, AZ. Ben has presented to thousands of Financial Advisors and their Clients over the past 12 years, sharing investment and retirement insights, along with market and economic trends. He is frequently a guest speaker at many professional conferences. He holds his series 7, 63 and 65.

George E Rambow III is a financial advisor with Edward Jones. Working closely with you, your CPA, attorney and other professionals, we can help determine the most appropriate financial strategy for you and your family. We also help with your retirement savings so you have more options when you retire, regardless of what you decide to do. Originally from Elkhart, IN, George joined Edward Jones as a financial advisor in 2012 opening the firm's fifth branch office in Tempe, AZ. George has a diverse professional background, serving in sales and management positions in the advertising, manufacturing, private capital, and fine arts industries. George attended Indiana University in Bloomington, IN, graduating in 1998 with a bachelor's degree in kinesiology. Active in the community, George is the president of the North Tempe Boys & Girls Club Branch Board of Directors, a member of the Tempe-Kyrene Business Advisory Council, and member of the Mesa Performing Arts Center Board. At Edward Jones, we're focused on you. The firm has thousands of people and advanced technology supporting our office so that we can help you reach your long-term financial goals.

Joyce Barden, CPA, CGMA, CBM, MBA is a Senior Professor/Accounting Program Chair for DeVry University and Keller Graduate School in the College of Business and Management. Specialization is teaching Financial, Intermediate Accounting, Auditing, Internal Auditing and Fraud/Forensics courses. Recipient of the DeVry "PRIDE Faculty Award" and Distinguished Professor Awards. She has spent 20+ years in Controller and Internal Audit positions with AT&T, Honeywell and Sperry Corporation as well as previous public accounting experience. Licensed in the State of Arizona, Joyce is a member of the American Institute of CPA's (AICPA), Arizona Society of CPA's (ASCPA), Association of Certified Fraud Examiners (ACFE) and Arizona Association of Certified Fraud Examiners (AZCFE), American Accounting Association (AAA), Accounting & Financial Women's Alliance (AFWA), Association of Certified Business Professionals (ACBM) and has served for two years on the Board of Directors of the Arizona Society of CPA's. She has also served on the Board of Directors for the Arizona Business Education Advisory Council for the past 20+ years. Former graduate of Keller Graduate School of Management and is a Becker Alum.

Yesenia Barraza Simmons, CPA, MTax is a Certified Public Accountant and the founder of YB Company LLC and Phoenix Tax Studio LLC. Both firms are Located in Central Phoenix and provide exceptional tax, accounting and consulting services to businesses and individuals. Mrs. Simmons has been recognized as a recipient of the "40 Hispanic Leaders Under 40 Award" by AZ Hispanic Chamber of Commerce. She received the Student Hall of Fame Award from the WP Carey School of Business at Arizona State University where she earned a Masters in Taxation. Yesenia is a member of the Arizona Society of CPAs and in 2016 served as the President of Dobson Ranch Toastmasters. She is also a member of the ASU National Alumni Council and serves on the board of the Girl Scouts Arizona Cactus Pine Council. Mrs. Simmons is a frequent volunteer and speaker at various organizations. She has a passion to increase financial knowledge in the community, loves to read, exercise, travel, and spending time with her wonderful husband and son.

Beth Golightly is a Senior Staffing Executive within the Accountemps - Salaried Professional Service (SPS) representing the east valley of the Phoenix metro area. Salaried Professional Service allows Accountemps to retain highly skilled accounting and finance professionals who are interested in a full-time consulting career – while providing our clients with time- and money-saving staffing solutions.

Theresa Valade, CPA is a tax and audit partner with Moffitt & Company, P.C., specializing in title insurance, escrow, mortgage banking and brokering, real estate and not-for-profit companies. As an audit partner, she is responsible for over 20 certified audits and is skilled in tax planning and income tax strategies. Theresa has been a guest speaker at The Arizona Escrow Association and The American Association of Residential Mortgage Regulators. Her speaking engagements have focused on the importance of internal controls, fraud prevention and the ABC's of understanding the financial statements. She also taught an Internal Controls and Fraud Awareness classes on a monthly basis and performed process based reviews of Accounts Payable, Benefit Plans, Capital Expenditures, General Accounting, Information Technology and Purchasing. Theresa is a member of the American Institute of Certified Public Accountants, Arizona Society of Certified Public Accountants and Arizona State Escrow Association. She graduated from Arizona State University with a Bachelor of Science in Business Administration with an emphasis in Accountancy.

Lynn Moran MBA, ACC is a Co-Owner and Co-Founder of Arizona Coaching and Consulting Center and is a certified coach and certified Six Sigma Greenbelt. With over 30 years of extensive business experience, she brings a wealth of knowledge and a history of success to her coaching and consulting clients. During her tenure with Mars, Inc., Lynn was promoted to President of Ethel M Chocolates, a Mars, Inc. boutique retail/direct-to-consumer gourmet confectionary company. While President of Ethel M®, Lynn launched a literacy program titled “Feed Your Mind” and in 2002, she was named one of the Most Influential Businesswomen in Southern Nevada. Lynn focuses primarily on executive, leadership, individual and team performance coaching. In addition, she coaches around change and project initiatives. Lynn has a BS degree in Business Administration and a MBA degree from Fairleigh Dickinson University. She is a Board Member of the Institute for the Advancement of AD/HD Coaching and Southwest Job Network and is a member of FDU Now and The President's Circle at Centenary College.

Dee Crane is the co-owner of Arizona Coaching & Consulting Center. Dee has been coaching and training individuals of all ages for over 35 years. A Professional Personal Coach and consultant since 1998, Dee has achieved the Associates Certified Coach Credential (ACC) with the International Coaching Federation (ICF) and the designation of Senior Certified ADHD Coach (SCAC) from the Institute for the Advancement of ADHD Coaching (IAAC). Her clients include executives, academics, lawyers, engineers, and physicians. Dee is dedicated to growing the coaching profession and has extensive experience training and speaking about coaching on a local and national level. Her training includes; Inquiring Leadership, Question Center Coaching, Adler School of Professional Coaching, SW. Parent Coaching, CoachVille, FastTrack and Center for Disability Law, Level III Advocacy.

Stephen C Mason, CMA is Chief Financial Officer for Old World Communities, LLC. Steve earned his Bachelor's Degree in Accounting and Business Management from Arizona State University. Steve is a chief financial manager balanced between financial control/reporting and resourcing business field operations. His leadership style is that of a teacher/mentor who leads from the front always with “hands-on” skills.

Justin Gillespie is Principal - Business Intelligence and Data Warehousing at The Hackett Group Justin is a leader within the analytics and data management space. He has twenty years of experience in business intelligence, data warehousing, data management, advanced and predictive analytics. Justin runs the Analytics and Data Management practice at the Hackett Group with over 70 consultants in the US and Latin America. He speaks regularly at professional symposiums, seminars and conferences on the business value of analytics and creating an analytics-centric, sentient, organization. Justin earned his Bachelor's Degree in Political Science from Arizona State University and Masters in Political Science and Economics from Washington University in St Louis.

GENERAL INFORMATION

FACILITIES: The Edward Jones Training Facility is located at 8333 S. River Parkway in Tempe. Seminar attendees should plan to bring photo ID to pick up their visitor badge at the front desk. Please note this is a no smoking campus.

CPE CREDIT: The Accounting & Financial Women's Alliance 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 submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

A CPE Certificate of Completion form is included in your attendee materials. Please complete both copies and have the certificate signed. Return one copy of your form to the registration desk before leaving the seminar. Keep the white copy for your records. A program evaluation is also provided in your registration packet. Please take the time to complete the evaluation form as your feedback is very important to us and assists us with planning future events. Please return your evaluation form to the registration desk.

All sessions are group live and have no prerequisite or advanced preparation required unless noted in the session description.

SEMINAR CONTACTS:

Laura Mangan at lauralynne@earthlink.net or 480-276-5926

CHAPTER WEBSITES:

AFWA Mesa East Valley Chapter: www.mesaeastvalleyafwa.org
IMA AZ Valley of the Sun Chapter: www.imavalleyofthesun.org

AFWA History & Mission

The Accounting & Financial Women's Alliance (formerly the American Society of Women Accountants) was formed in 1938 to increase the opportunities for women in all fields of accounting and finance. The first chapter was chartered in Indianapolis, Indiana. Members and their companies benefit from practical resources and programs that strengthen their professional growth. Accounting & Financial Women's Alliance members tap into an extensive knowledge base of accounting and finance professionals with technical expertise to provide solutions for the most complex issues. The majority of our members have attained professional certifications such as CPA, CMA, CIA, and CFP. The mission of the Accounting & Financial Women's Alliance is to enable women in all accounting and related fields to achieve their full personal, professional and economic potential and to contribute to the future development of their profession. www.afwa.org

IMA History & Mission:

With a network of about 60,000 professionals, the Institute of Management Accountants (IMA) provides a dynamic forum for management accounting and financial professionals to develop and advance their careers through its Certified Management Accountant (CMA[®]) program, cutting-edge professional research and practice development education, networking, and the advocacy of the highest ethical and professional practices. IMA is dedicated to rebalancing the accountancy profession by educating society regarding the business building role of management accountants and finance professionals working inside organizations. The mission of IMA is to empower accountants and financial professionals to become "trusted business advisors" playing a driving role in their organizations' business success and advancing their careers. www.imanet.org