

STRAIGHT FROM THE HEART

HEART OF WISCONSIN IMA NEWSLETTER

September 2017

The Never Forgotten Honor Flight

History and Data about our Veterans, Guardians, and Fund Raising

September 19, 2017 Dinner Meeting Agenda



Meeting Location: Pinewood Supper Club
1208 Half Moon Lake Dr., Mosinee
715-693-3180

Board Meeting: 5:00—5:30 pm
Registration and Social Time: 5:30—6:00 pm
Dinner: 6:00—6:40 pm
Presentation: 6:40—7:30 pm

Choice of one of the following menu items:

- Broiled Canadian Walleye—served with baked potato.
- 8 oz. Prime Center Cut Sirloin—served with baked potato.
- Chicken Pasta Primavera—fresh veggies tossed with fettucine, garlic, olive oil and a hint of Cajun spice. (Vegetarian option available.)

All options served with veggie tray/dip, tossed salad and rolls.

Investment:

\$25.00 Members & Guests
\$20.00 Professionals Between Opportunities & Retired Members
\$15.00 Students

Please make dinner reservations by noon on Friday, September 15, 2017
at <http://www.heartofwi.imanet.org/reservations>

Volunteer Opportunity!

Financial Coach
Training
Workshop

Please see page 5 for
more information.

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Speaker Biographies

Mike Thompson — President and Co-Founder of the Never Forgotten Honor Flight

Mike graduated from Mankato State University in 1973 and served in the Iowa Air National Guard from 1969-1975. He moved to Wisconsin in 1980 with a job transfer and sent one boy and two girls through DC Everest and college. Mike retired from 40 years in sales and sales management as a print and promotional distributor in the central Wisconsin area. He enjoys golfing, skiing, scuba diving, and biking and currently lives and performs his Honor Flight duties out of his home office on Lake DuBay. Mike has been active in Boy Scouts, youth soccer, baseball, cancer fundraising and for the last eight years as the President and Co-Founder of the Never Forgotten Honor Flight. He is also a member of the Wausau Elks, Man of Honor, and the American Legion Post 10.

James Campbell — VP Marketing and Co-Founder of the Never Forgotten Honor Flight

James attended the University of Wisconsin – Stevens Point and received his B.S. in Biology and General Science. His background in the technology industry led him to work at IMB, MSI Systems Integrators, Gander Mountain, RMM Solutions, and Central WI Firearms. He is also a retired Lt. Col. in the US Marine Corps. James is the Co-Founder of the Never Forgotten Honor Flight and currently serves as the VP of Marketing. James is also very active in community organizations, including the Rotary Club of Wausau, American Legion, Elks, Man of Honor Society and is a WI Hunter Safety Instructor as well as the SAFER District Fire Commissioner. James has been awarded the 2005 & 2006 President's Volunteer Gold Service Award, the 2007-2008 Silver Award and the 2009-2015 Presidential Volunteer Awards. James was also awarded the Wausau Man of the Year 2010 as the Never Forgotten Honor Flight Co-Founder.

President's Message

Welcome back to a new fiscal year. As always, we have a great board who have worked very hard for another successful and informative year. We are continuing our Debits for Credits program with a few adjustments. We also have a half day Mr. Excel this May. Comments, suggestions and your presence are always welcome.

Kim Buehler, CMA, CFM, CPA

2017—2018 Chapter President

Heart of Wisconsin Chapter of the Institute of Management Accountants

<http://heartofwi.imanet.org/>



Adopt a Highway

Thursday, October 12, 2017
(Rain Date:: October 19, 2017)

4:30 pm

County Highway X
(North of Stevens Point)

Volunteers should meet at the corner of Maple Drive & County Road X. Parking is available on Maple Drive.

Please bring your own gloves and wear long sleeves and long pants.

Questions?

Contact Zac Szprejda at



Contact Us

Find us on Facebook

or

Visit us on the web at
heartofwi.imanet.org

CMA®

*IMA's Certification for
Accountants and
Financial Professionals
in Business*

Congratulations!

June IMA Member Anniversary

Thomas Jasurda—30 years
Richard Towne—10 years

September IMA Member Anniversary

Ann Young—20 years
Chad Oelke—15 years
Patricia Steines—15 years
Eric Ledvina—10 years
Timothy Peterson—5 years

Debits for Credits

The Debits for Credits program is back again this year. It's a fun way for you to get a chance to win money by being an engaged member of the Heart of Wisconsin IMA chapter.

You will earn points ("credits") for participation in chapter events and IMA career development. We'll keep track of your points over the course of the chapter year. Every five points that you earn will get you one chance for a prize at the April chapter meeting, provided you have at least 25 total points. We will hold a drawing for four \$50 cash prizes. (Fun fact: The Debits for Credits program was originally designed to award a debit card, rather than cash, as a prize, hence the program's name.)

You don't have to be present at the April meeting to win. In fact, you don't even have to be a registered chapter member or specifically sign up for this incentive to participate. You will automatically earn points just by attending or participating in any of the following activities:

Available CREDITS:

Be/Become an IMA Member	5 points
Attend a dinner meeting	5 points (per meeting)
Participate in an IMA Community Event	10 points (per event)
Donate to food/clothing drive	5 points
Pass CMA exam part	25 points (per part)
Earn CMA certificate	15 points
Attend a board meeting	5 points (per meeting)
Attend a networking event (student)	5 points (per event)
Attend a networking event (professional)	15 points (per event)
Like the December Ethics meeting notice on Facebook	5 points
Like the May Mr. Excel meeting notice on Facebook	5 points
Pass the new CSCA Exam	25 points

Good luck!

2017—2018 Board of Directors

President	Kimberly Buehler
Admin Team Leader	Mary Tomazin
Secretary	Alissa Barth
Treasurer	Cole Monroe
Director of Meetings	Cinda Mijal
Communications Team Leader	Lindsey Somers
Co-Director of Newsletter	Patti Ostrem
Co-Director of Newsletter	Katie Trzebiatowski
Co-Director of Newsletter/Facebook	Erin Sweet
Webmaster	Jennifer Poggemann
Director of Public Relations	Ann Young
Director of Community Service	Zac Szprejda
Director of Student Activities	Kara Hoier
Director of Member Acquisition	Becky Austreng
Director of Retention & Participation	Doreen Waksmonski
Co-Director of Member Attendance	OPEN
Co-Director of Member Attendance	OPEN



Contact info for our board members can be found on the website at heartofwi.imanet.org. If you are interested in joining the board, please send an email to Kim Buehler at Kim@accounting-offices.com.

Upcoming Events!

Tuesday, October 17

Monthly Dinner Meeting
Scott Price—CWACT Stevens Point Community Theatre
Location: Michele's, Stevens Point

Wednesday, October 25

LUNCH Meeting
Jerome Segura—Natural Amenities and State and Local Government Finances
Location: Stevens Point Library—Pinery Room

SAVE THE DATE Tuesday, December 12

Mystery Fraud Night—3 hour **Ethics** training session
Location: Stevens Point Country Club

Watch for upcoming information!

FWPC Financial Coach Training Workshop

Registration

Register on line at

<https://goo.gl/M3nn5z>

or complete the form below.



Name _____

Local Address _____

Local City, State Zip _____

Daytime Phone _____

Cell Phone _____

Email _____

Are you willing to serve as a Volunteer

Coach? Financial Coaching Volunteers, if accepted, agree to attend all training sessions. After completing the training, volunteers must agree to work with at least two individuals or families requesting financial coaching over the next year.

Yes. There is no charge for Volunteer Training.

No. Enclosed is my check for \$25.

**Make Check Payable To:
Portage County Treasurer**

Mail to or Drop Off Registration

Portage County UW-Extension
Financial Wellness of Portage County
Portage County Annex, 2nd Floor
1462 Strongs Avenue
Stevens Point, WI 54481

Financial Wellness Coaching Program

This program is designed to develop skills and confidence in individuals who assist people in managing their money.

For more information contact

Sherry Daniels

Portage County Family Living Educator

(715) 346-1321

sherrv.daniels@ces.uwex.edu



Portage County

Training Materials:

Family Financial Management Program
Family Living Education
University of Wisconsin-Extension
Cooperative Extension Service

University of Wisconsin, United States Department of Agriculture and Wisconsin Counties cooperating. UW-Extension provides equal opportunities in employment and programming, including Title VI, IX requirements.

FINANCIAL COACH TRAINING WORKSHOP



Various dates in October
5pm - 7pm

Sentry Home Office

1800 North Point Drive

Stevens Point, WI 54481



Do you have an interest in helping individuals or families who may be looking for answers to confusing financial matters?

Do you have a desire to help these families reach their goals?



We have a financial coaching program in place that will offer training in:

- Talking to people about finances
- Determining family income and expenses
- Developing a family spending plan
- Credit use and family debt problems
- Coaching techniques
- An overview of community resources

AGENDA

Where: Sentry Home Office
1800 North Point Drive
P2 (the glass classroom by Sentry Credit Union)

When: 5:00pm - 7:00pm

Dates: Thursday, 10/19/17
Tuesday, 10/24/17
Thursday, 10/26/17
Tuesday, 10/31/17
Thursday, 11/2/17

November 2nd is a "make-up" date if necessary

Topics to be covered

- Exploring Money Beliefs
- Community Services Available
- Spending Plans
- Steps in Financial Coaching Process
- Communication Techniques
- Role Playing
- Questions

Cost for Volunteers

FREE

Cost for Others

\$25.00

FINANCIAL WELLNESS COACHING TRAINING

This program will give you confidence in managing finances. You will be able to work with families, giving them encouragement, sharing resources, and helping through some basic goal setting and decision-making.

HERE ARE A FEW TYPICAL SITUATIONS WHERE YOU MAY ASSIST A FAMILY:

- A parent who never learned to "budget" money.
- A divorce situation needing to support children on a reduced income.
- The laid off employee who needs to prioritize finances to make best use of the paycheck and/or unemployment compensation.
- The young family who wants to make plans for purchasing a home, but doesn't know where to start.

If you are interested in participating in the Financial Wellness Coaching Training program, register on line at

<https://goo.gl/M3nn5z>

or complete the registration in this brochure and return to the address given.