

The Pony Express

Summer 2009

www.imawest.imanet.org

PRESIDENT'S MESSAGE

WWC Pony Express President's Letter for Summer 2009

Dear Wild West Council members:

I have been handed the baton for the Wild West Council 2009-2010 year and I look forward in continuing the traditions of our Past Presidents :

- Providing **Continuing Professional Education** to the Chapters and WWC
- Promoting the **CMA Certifications** and providing **CMA study resources** to our membership
- Increase **Chapter Participation** in Council meetings and activities
- Support our **Regional Vice President, Pem Smith** in strengthening support of chapters through the **Regional Director Program**
- Support our **President Elect, Lyle Braithwaite** with the **Leadership Training Sessions(LTS)**

In addition, one area that I plan to focus on this year is to improve the communication between the Wild West Council and Chapters as follows:

- Opening up communication within the Wild West Council and Chapters with the **LinkUP IMA Online Social Network**; I have asked **Pamela Zanzucchi**, secretary of the WWC for help on this.
- Locate an outside service that will aid in

Continued on page 2

Wild West Council Meeting

Saturday August 22, 2009 1:00 pm

At Chapman University College
Irvine Campus (new location)
16355 Laguna Canyon Road
Irvine, California 92618

IMA Wild West Council Presents

The IMA CMA Learning System

Saturday August 22, 2009 8:30am to Noon

At Chapman University College
Irvine Campus (new location)
16355 Laguna Canyon Road
Irvine, California 92618

- Overview of IMA CMA Learning System
- Value of CMA Certification
- Networking
- 2 hours CPE
- **NO CHARGE** for Event

See page 4 for more details.

INSIDE THIS ISSUE

- | | | | |
|-----|-----------------------------------|------|--|
| 1-2 | President's Message | | |
| 2 | Wild West Council Officer Listing | 3 | WWC Pony Express VP's Letter for Summer 2009 |
| 4-7 | WWC August meeting information | 8-11 | Minutes – Apr 2009 |

maintaining a **WWC e-mail data base**.

Mitch Lenoil last year proposed a Data Base Coordinator to maintain the Council e-mail list.

- Council-wide **Speakers List** proposed by **Lee Willard**.

Our first Council meeting and events will be held in **Irvine, California** on **August 21-22** at **Chapman University College**. I have been working closely with **Vince Glaeser**, the Program Director at Chapman on putting on an interesting program. On Saturday morning, you will have a great opportunity to find out about **The IMA CMA Learning System**, the only live IMA CMA Review course offered in Southern California. **Walter Corrigan, CFM, CMA** the instructor for the course will provide an overview of the CMA Learning System. There will testimonials by successful students. **Ken Tudhope, CPA, CMA**, President of the Orange County Chapter will talk about the value of the CMA, chapter affiliation and networking.

The second Council meeting will be a joint meeting with the **Rocky Mountain Council** in **Phoenix Arizona, October 23-24**. The Phoenix chapter has already begun planning for the event and I am expecting a very interesting and exciting program. **Kathleen Moren**, the President of the Phoenix chapter, has been keeping me informed of their progress.

The third Council meeting will be in **San Diego California, January 22-23**. This will take place in the backyard of our **Regional Vice President, Pem Smith** which we can be assured of an outstanding program.

The fourth and last Council meeting will be held in **Las Vegas, Nevada, April 23-24**. **Cecilia Mutee**, President of the Las Vegas chapter has indicated to me, that the Las Vegas chapter is interested in co-sponsoring a CPE program with a Wild West Council which should be a dynamite program. Also, on Saturday, there will be a **Leadership Training Sessions (LTS)** conducted by the **President Elect, Lyle Braithwaite**.

On another note, the **CMA Rallies** that Pem Smith and I put on last year have been paying dividends. **Ron LaPlante**, instructor of the CMA review, has reported that over 14 students are studying for the CMA exam as a result of them attending the Rallies.

Wishing you all well and will see you at the Irvine Council meeting.

Frank Garcia

WILD WEST COUNCIL OFFICERS 2009-2010

President

Frank Garcia, CPA, CMA
626-905-8447(c)
626-963-6185(h)
garciaflm@theima.org

President Elect

Lyle Braithwaite
801-964-6726(h)
Lfbcpa@comcast.net

VP-Administration

Rex Soutar
626-964-1933
rsouter@msn.com

VP-Chapter Relations

Jamie Russell
661-333-2987(c)
661-589-7664(h)
jamiebakersfield@yahoo.com

Secretary

Pamela Zanzucchi
602-277-3700
pzanzucchi@afpersonnel.com

VP- Education

Dennis Littleford
661-317-8712
Dennis_littleford@hotmail.com
Bill Pawlick
310-547-0184
billmarge@sbcglobal.net

VP-Students

VP – Meetings

Tom Gulick
818-825-0004
tmgulick@att.net

Treasurer

Lee Willard, CPA, CMA, CFM
562-696-8740
Willardtax@aol.com

Webmaster

Frank Garcia, CPA, CMA
626-905-8447(c)
626-963-6185(h)
garciaflm@theima.org

Regional Vice-President

Pem Smith
858-518-8001
pem_smith@roadrunner.com

This Year's Schedule:

Aug 22, 09 Chapman University College – Irvine, CA

Oct. 23-24, 09 Joint Council meeting with Rocky Mountain Council – Phoenix, AZ

Jan 22 -23, 10 San Diego, CA

Apr. 23-24, 10 Las Vegas, NV

WWC Pony Express VP's Letter for Summer 2009

Dear Council and Chapter Leaders:

On July 1, I assumed duties as the Wild West Council's Regional Vice President, taking over from **John Campbell**. I want to start out expressing appreciation to John for the excellent job he did representing the Council on the IMA Board of Directors and the Committee on External Member Relations.

In my role as Regional VP, I will be on the IMA Board of Directors and participating actively on the Committee on Volunteer Leadership. Attracting, training and retaining talented individuals for leadership roles at the chapter, council and worldwide levels of IMA is a passion for me, and I'm excited to have been appointed to this committee. Watch for announcements of upcoming programs and opportunities for volunteer leaders.

My other role as Regional VP is to coordinate the efforts of our Regional Directors in mentoring and assisting chapter leadership in successfully serving our members. I am pleased that we have a strong group of experienced leaders serving in these important positions. The Regional Directors for 2009 – 2010 are:

- Don Hartman – Las Vegas
- Janet Radford – Bakersfield, LA Metro
- Mitch Lenoil – Santa Barbara
- Billie Drake – Arizona Valley of the Sun, Tucson
- Lyle Braithwaite – Salt Lake City
- Rob Ferrell – Inland Empire, Orange County, San Gabriel Valley
- John Campbell – South Bay

I'm still looking for a volunteer to mentor the San Diego and San Diego North County chapters.

Finally, I want to congratulate the award winning chapters in our Council for 2008-2009. These awards represent recognition of the hard work each chapter board invests in providing value to our members. Thank you for all you do for IMA.

Chapter Competition Banners (Chapter President in parentheses):

- 8th Place Warner Division – South Bay (William Pawlak)
- 15th Place Warner Division – Tucson (Michael Paull)
- 15th Place Stevenson Division – Las Vegas (Cecilia Mutee)
- 17th Place – Stevenson Division – Arizona Valley of the Sun (Camille Cook)

Chapter Awards:

- Chapter Newsletter Bronze Award – Arizona Valley of the Sun
- Chapter Roster Silver Award – Arizona Valley of the Sun
- S. Alden Pendleton Award for Community Service – Arizona Valley of the Sun
- Three Year Membership Achievement – Member Acquisition – Inland Empire

Thanks again for the opportunity to serve IMA, our chapters and our members. Feel free to contact me through LinkUp IMA at www.imanet.org, by cell phone 858-232-1462 or email pem_smith@roadrunner.com if I can help your chapters in any way over the year.

Pem Smith

Wild West Council Meeting and CMA Event

August 22, 2009

*At Chapman University College
Irvine Campus (new location)
16355 Laguna Canyon Road
Irvine, California 92618*

(Suggested Hotel \$139/night)

Doubletree Hotel Irvine-Spectrum

90 Pacifica
Irvine, California 92618
1-949-471-8888

The IMA CMA Learning System:

Saturday, August 22, 8:30am to Noon

8:30am - **Sign in**, networking, and light refreshments
9:00am - Welcome - **Vince Glaeser**, Program Director, Chapman University College
9:15am - Overview of CMA Learning System - **Walter Corrigan, CFM, CMA**, Instructor
10:15am - Comfort break
10:30am - Value of CMA Certification, chapter affiliation and networking – **Ken Tudhope, CPA, CMA**, IMA Orange County Chapter President
11:30am - Testimonials by successful students
11:45am - Tour of the new campus

RVSP to: Mary Shelton Fax (714)997-6641 Tel (714)532-6049 shelton@chapman.edu

Wild West Council Meeting:

Saturday, August 22, 1pm to 4:30pm

All events will be held at Chapman University College, Irvine Campus



Summer 2009 Pony Express Page 5



IMA Wild West Council
Presents

The IMA CMA Learning System

Are you Certified as a Management Accountant? Are you ready for the CMA Exam? Are you looking for a complete and comprehensive review program? Are you interested in a live instructor-led IMA CMA review program?

Come by and find out about the only live *IMA CMA Learning System* course offered in Southern California. Meet the instructor; hear testimonials from former students; hear what a recruiter says about the value of the CMA.

**Saturday, August 22
8:30AM – Noon**

**Chapman University College
Irvine Campus (new location)
16355 Laguna Canyon Road
Irvine, CA 92618**

8:30am - **Sign in**, networking, and light refreshments
9:00am - Welcome - **Vince Glaeser**, Program Director, Chapman University College
9:15am - Overview of CMA Learning System - **Walter Corrigan, CFM, CMA**, Instructor
10:15am - Comfort break
10:30am - Value of CMA Certification, chapter affiliation and networking - **Ken Tudhope, CPA, CMA**, IMA Orange County Chapter President
11:30am - Testimonials by successful students
11:45am - Tour of the new campus

Visit: www.imanet.org/certification.asp to find out more about the CMA

About our speakers:

Walter Corrigan, CMA, CFM is the Director of CMA Programs for the IMA Inland Empire Chapter and is a chapter past president. Has over 25 years experience in a variety of financial and management accounting positions. Currently is a V.P. at Environmental Lighting for Architecture, Inc. Has BA and MBA, with Honors, from California State University, Fullerton.

Ken Tudhope, CPA, CMA is President of the IMA Orange County Chapter. Ken is the CEO and Founder of **Project Pro Search** that source Finance and Accounting talent for interim projects and direct-placement positions. He has a BA from the University of Washington and a MBA from the UCLA Anderson School of Business.

***There is no charge for the event, but space may be limited.
Reserve now to ensure a seat.
RSVP by Monday, August 17th using the attached form by email or fax.***



Summer 2009 Pony Express Page 6

The IMA CMA Learning System

Saturday, August 22
8:30 – 11:45AM

Chapman University College
Irvine Campus (new location)
16355 Laguna Canyon Road
Irvine, CA 92618

No Charge for this Event

RSVP to:

Mary Shelton, Program Coordinator
Chapman University College Extended Education
Phone 714-532-6049
Fax 714-997-6641
shelton@chapman.edu

I plan on attending the **IMA CMA Learning System** presentation:

Name _____

Email _____

Phone _____

IMA Member? Yes _____ Chapter _____

No _____



CHAPMAN

UNIVERSITY COLLEGE

Irvine Campus (new location)

16355 Laguna Canyon Road, Irvine, CA 92618
Phone: (949) 753-4774

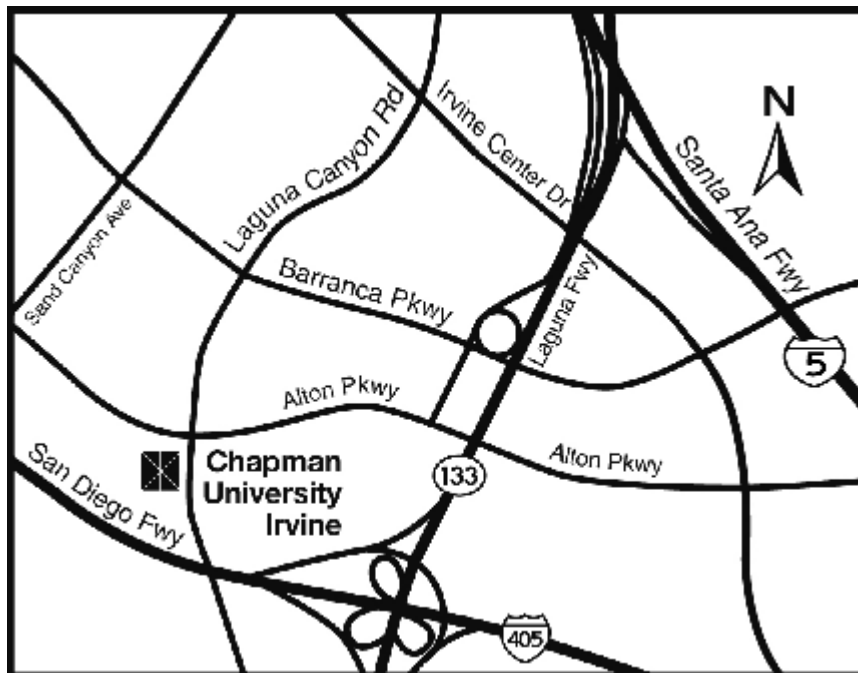
Driving Directions

From Hwy 133 South: Hwy 133 to Barranca Pkwy exit.
Cross Barranca Pkwy and turn right on Alton Pkwy. Left on Laguna Canyon Rd.
Turn Right on Pasteur to enter the parking lot.

From I-5 South: Hwy 5 to Barranca Road exit.
Cross Barranca Pkwy and turn right on Alton Pkwy. Left on Laguna Canyon Rd.
Turn Right on Pasteur to enter the parking lot.

From I-405 North or South: Hwy 405 to Sand Canyon Exit. North to Alton Pkwy.
Right on Alton Pkwy, Right on Laguna Canyon Road.
Turn Right on Pasteur to enter the parking lot.

From points south traveling north on Laguna Canyon Road:
Left on Laguna Canyon Road before you reach I-405.
Pass over the freeway and turn Left on Pasteur to enter the parking lot.



IMA WILD WEST COUNCIL
BOARD MEETING MINUTES
DeVRY UNIVERSITY
POMONA, CALIFORNIA
APRIL 25, 2009

Meeting called to order by WWC President Mitch Lenoil at 1:13 p.m.

Members in attendance:

Arizona Valley of the Sun Chapter: Diane Hewlett, Pam Zanzucchi, Kathleen Moren, Karen Timian, Camille Cook, Sandy Burton, and Sal Forzano. Additionally via teleconference: Susan Bobbe, Ron Soldyn, and Laura Morgan.

Las Vegas Chapter: Patrick Wilson, John Campbell, Billie Drake, and Cecilia Mutee

Los Angeles Metro Chapter: Rex Soutar, Janet Radford, and Mitch Lenoil

Orange County Chapter: George Bloom

Salt Lake Chapter: Lyle Braithwaite

San Diego Chapter: Pem Smith

San Gabriel Valley Chapter: John Pollara, Robert Ferrell, and Frank Garcia

South Bay Chapter: Carolyn Reis, Robert Gove

Tucson Chapter: Don Hartman

WWC President Mitch Lenoil began the meeting by thanking many individuals for their help in the 2008-09 year and handed out Starbucks gift cards to them in appreciation.

Regional Directors and Chapters:

Pem Smith, Santa Barbara & San Diego North County - reported good attendance at San Diego meetings, which alternate between lunch and dinner each month. Also noted the February CMA Rally in San Diego attracted 20+ members, and that they will hold a CMA Review course for Part 3 in May. He also reported that San Diego North County Meetings are bi-monthly and attendance is around 20.

Ronda Alvarez, Bakersfield & L.A. Metro - not present, no report.

Lyle Braithwaite, Tucson & AZ Valley of the Sun - reported that the Tucson Chapter's Mike Paul will be serving a second year as President, and that their meetings have become more successful with better speakers and meeting location.

Don Hartman, Las Vegas and San Diego - Don spoke well of the high level of energy in the Las Vegas Chapter and its President Cecilia Mutee, and also noted that San Diego's Chapter has an active Board.

Lyle Braithwaite reported that the Salt Lake Chapter was looking for a new President.

Don Hartman remarked that the Tucson Chapter has 50 to 70 active members in a 120-person Chapter.

Frank Garcia reported that their Saturday meetings in the San Gabriel Valley Chapter receive 20 to 25 in attendance, but lamented at the low turnout at recent computer-skill seminars.

Summer 2009 Pony Express Page 9

The Inland Empire reports 35 in attendance at their meetings.

The South Bay Chapter will have a Past President returning after 15 years, and three recent speakers were featured in Wall Street Journal articles. Carolyn Reis said that South Bay's Planning Meeting was coming up, and that five outstanding students would be recognized at a future meeting.

George Bloom mentioned that the Orange County Chapter featured a speaker from the military, from Camp Pendleton, and that the meeting had 25 to 30 in attendance.

Karen Timian brought up that the AZ Valley of the Sun Chapter surveys members via the survey monkey.com website. Karen said the Chapter has been fortunate to have good speakers who were mostly referred by members.

Regional Vice President's Report

National Committee Reports:

Governance Committee - John Pollara was happy to report two consecutive months of positive growth in the IMA, and mentioned that IMA is now offering group discounts for multiple memberships placed by a firm, as well as new membership programs. Though these measures involve short-term costs, John feels they will bring about long-term benefits. He also mentioned that 2010 will be a pivotal year that will feature a cornerstone program, information technology improvements at IMA National, including Web 2.0, and a review of the CMA program.

Member External Relations Committee - the committee is working on building alliances with other professional associations.

Planning & Development Committee - according to John Pollara, the committee is focusing on small tasks to bring in more members on a long-term basis, on account of limited resources

Performance Oversight Committee - no report

Volunteer Leadership Board Committee - John Pollara, who is the Committee Chair, mentioned the Global Service Pool Advisory Committee will give its final report in June.

Board of Regents Standing Advisory Committee - no report

Ethics Standing Committee - Billie Drake reported that a winner has been selected in the Carl Menconi Case Competition, and that it will be announced soon in the Strategic Finance magazine.

FAR/MAC Standing Committee - no report

Financial Reporting Standing Advisory Committee - no report

Young Professional Standing Committee - no report

Recognition and Compensation Advisory Committee - no report

Stuart Cameron McLeod Society - Billie Drake reported that the mid-year conference in Albuquerque went well, and that the induction of members will be on the Monday night of the Annual Conference in June, and encouraged members to identify someone in their Chapter who would qualify for membership.

Nominating Committee Report

The following slate of 2009-10 Wild West Council officers was presented:

Summer 2009 Pony Express Page 10

President Frank Garcia
President-elect Lyle Braithwaite
Treasurer Lee Willard
VP Administration Rex Soutar
VP Meetings Tom Gulick
VP Education Dennis Littleford
VP Chapter Relations Jamie Russell
VP Students Vacant
Webmaster Frank Garcia
Secretary Vacant

The slate was approved by a motion from Pem Smith, with a second by Billie Drake. Motion passed.

Secretary's Report

The Secretary's Report from the January 24th WWC Meeting was approved by a motion from Sandy Burton, with a second by Sal Forzano. Motion passed.

Treasurer's Report

Several in attendance suggested reducing the WWC assessment per member. Rex Soutar said that just because the assessment per member was \$1. Before doesn't mean it can't be changed. Karen Timian thinks that funding CMA awareness should be key. Pem Smith asked what other programs the WWC should pursue. John Pollara asserted that the WWC Strategic Plan should be part of input as to how much assessments should be. Mitch Lenoil suggested negotiating assessments with Chapters. Rex Soutar suggested transferring a portion of the General Fund to the Norberg and Roger's Funds. It was decided that an ad hoc Strategic Planning/Budget Committee would be formed based on these discussions, and would be comprised of the following WWC Members: Frank Garcia, Rex Soutar, Lee Willard, and Lyle Braithwaite. Decisions about the Treasury would be made by the August 2009 WWC Meeting. The Treasurer was authorized to add two new signatures to the bank account. Rex Soutar & Carolyn Reis suggested that the WWC donate a portion of the Student Fund to the Stuart Cameron McLeod Society (SCMS), to help attract students to become future members of SCMS. Rex Soutar made a motion to grant the Council the right to renew certificates of deposit at the best available rate. Sandy Burton seconded. Motion passed.

Council Officer's Reports

President-elect Frank Garcia proposed the following schedule of events for 2009-10: August 22 in Long Beach for location, with a possible seminar on Friday afternoon, and a CMA promotional event and the WWC Meeting on Saturday; October 23 in Phoenix, with the Rocky Mountain Council joining in; January 22 in San Diego, based on the success of a previous CMA rally at National University there; April 23 in Las Vegas.

VP Administration - no report

VP Education - no report

VP Meetings - no report

VP Chapter Relations - June 1st was established as the deadline to include items in the Pony Express publication.

Webmaster - no report

Strategic Plan Initiatives - A Strategic Planning Committee will be formed by the WWC President, President-elect, and immediate Past President. Mitch Lenoil commended Frank Garcia and Pem Smith for their efforts in making the recently held CMA rallies a success.

Summer 2009 Pony Express Page 11

Old Business - WWC shirts are still available for a reduced price of \$25. The Annual Conference in Denver is coming up in June.

New Business

The Nominating Committee for 2010-11 will be chaired by Pem Smith.

Sal Forzano and Frank Garcia suggested rotating the Secretary position. Mitch Lenoil thinks two is a good maximum number of individuals for the position. Frank Garcia will discuss with volunteers. Possibilities for Secretaries of future meetings are Janet Radford for August, and Karen Timian for October.

Cecilia Mutee discussed how the Las Vegas Chapter compares the National Membership List to the Chapter's list, as well as the list for the email blast. Mitch Lenoil thought that email blasting services could be inserted into the upcoming WWC budget, and suggests that Frank Garcia look into it and form a committee.

Carolyn Reis motioned to adjourn the meeting, and Sandy Burton seconded. Motion passed.

The meeting adjourned at 3:19 p.m.



Jamie Russell
13812 Veracruz Drive
Bakersfield, CA 93314
Jamiebakersfield@yahoo.com

ADDRESS CORRECTION REQUESTED

www.imawest.imanet.org



WILD WEST COUNCIL

PONY EXPRESS

A Quarterly Publication



INSTITUTE OF MANAGEMENT ACCOUNTANTS