

SPECIAL POINTS OF INTEREST:

- **October 2008**
Ethics speaker published in Strategic Finance
- **March Luncheon** with PCACPA!
- **March Anniversaries!**

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March 24, 2009 Dinner Meeting

Auxiliary Unit Budgeting within Higher Education

presented by: **Laura Ketchum-Ciftci**



This session will focus on the budgetary procedures and processes for auxiliary units within a higher educational institution, specifically a University Center/Union and a Student Government Association. Gathering stakeholder input will be discussed as well as trends in higher education funding.

About Laura Ketchum-Ciftci

Laura Ketchum-Ciftci is the Director of University Centers at the University of Wisconsin-Stevens Point. She has been at UWSP for 20 years within the Residential Living, and Student Involvement and Employment Office before moving into the Centers Administration unit in 2004. Laura received her Bachelor of Science degree in Psychology from Viterbo University in LaCrosse, WI, her Master of Science in Education degree from UW-LaCrosse and her PhD from UW-Madison in Higher Educational Administration. Laura is married to husband, Ahmet Ciftci and they have two sons, Tayyib and Tarrik.

Meeting Agenda

Meeting Location: SentryWorld, Stevens Point

Board Meeting: 5:00 — 5:30 pm

Social Time: 5:30 — 6:00 pm

Dinner: 6:00 — 6:30 pm

President Remarks: 6:30 — 6:40 pm

Presentation: 6:40 — 7:30 pm

Dinner will be served buffet style. Chicken Piccata, Vegetable Lasagna, Cheddar Mashed Potatoes, Chef's Blend Vegetables, Tossed Salad, Freshly Baked Rolls and Butter, Brewed Coffee or Milk. Chef's Choice for Dessert.

Investment: \$22-professional, \$15-professionals between opportunities, \$11-students

Please make your dinner reservations by noon on *Friday, March 20th*.

Online registration at: www.heartofwi.imanet.org/dinner_reservations.htm



President's Message

Greetings!

We had an excellent February speaker and we are offering two CPE opportunities in March. With only a handful of meetings left I hope you have had a chance to take advantage of the great and cost effective educational opportunities that the Heart of Wisconsin provides.

We are always looking for input from our members and with next year's board elections coming up we would welcome any interested and willing participants.

For all the latest about our chapter, including meeting details and employment openings, don't forget to visit our website.

Best regards,

Kimberly J. Buehler, CMA, CFM, CPA

President, 2008-2009

Our October 2008 ethics speaker published in *Strategic Finance*

Leading with Your Soul

Kasthuri Henry, CTP

As business scandals continue to emerge, it's becoming more and more apparent that enforcing ethical values through legislation doesn't work. Ethical leadership comes from within an individual. To that end, utilizing the Comprehensive Ethical Leadership Model can help drive ethical leadership within your organization. It provides a road map to building an environment of value-centric leadership, helping companies develop the right values in their employees.

The full article can be found in the current issue of Strategic Finance, or online through imanet.org!

**March
Anniversaries**

15 years

Susan Henry

David Cyrtmus

**Congratulations to Robert Lynn for obtaining his
CMA certifications in February!**

CPE Luncheon Event

PORTAGE COUNTY AREA CPA & HEART OF WISCONSIN IMA

Join us for a 1 hour CPE opportunity in Stevens Point. Have a delicious lunch, earn CPE, and network with another professional accounting organization from Portage County. The PCACPA's primary focus is networking for local CPAs and future CPAs. They offer a monthly luncheon (third Wednesday of every month) in Stevens Point.

March 11, 2009

Vincent Ledlow, Director of Specialty Risk with Sentry Insurance.

Topic: Insurance Primer and Estate planning concepts

Vincent holds a Juris Doctorate from the University of Alabama School of Law and a Master of Laws in insurance law from the University of Connecticut. Vincent has over 19 years of law experience, both in private practice and as an Assistant Attorney General for the State of Alabama where he was the primary trial and appellate attorney for the state's Department of Insurance. Vincent joined Sentry Insurance in 2007 as the company's regulatory counsel and is currently serving as the company's Director of Specialty Risks.

Kristin's Riverwalk

1140 Clark Street, Downtown Stevens Point

Lunch 12 (noon), Presentation 12:20 – 1:10 pm

Menu Selection:

Small House Salad w/French Onion soup- Romaine lettuce, mushrooms, olives, tomato, cheddar cheese

Southwest Chicken Wrap w/Fries - Bacon, grilled chicken, Swiss cheese, lettuce, tomato, ranch dressing

Prime Rib Sandwich w/Fries- Seasoned sliced beef, hay stack onion rings, hoagie bun

Investment: \$6

Register by Friday, March 6. Send email with your name and menu selection to Corinne.Thompson@sentry.com

PCACPA



Heart of
Wisconsin
Chapter

Contact

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Corinne.Thompson@sentry.com

Lisa Shopinski – IMA
Lisa.Shopinski@sentry.com

715.346.8293



Take your career to a higher level. Become a leader in your organization.

Today's accounting and finance professionals can achieve and become tomorrow's business leaders! Join the Institute of Management Accountants (IMA) at our 90th Annual Conference & Exposition and take your career to new heights.

This galvanizing annual event features three days of exciting and informative sessions delivered by some of the most renowned thought leaders in accounting and finance, including:

- **Marianne Jennings**, Professor of Legal and Ethical Studies, Arizona State University
- **Kurt Kuehn**, Chief Financial Officer, UPS
- **Richard Lamm**, Three-term Governor, State of Colorado; and Co-director, Institute of Public Policy Studies, University of Denver
- **David Walker**, President and CEO, Peter G. Peterson Foundation; and former U.S. Comptroller General

With a conference program of nearly 40 sessions to choose from, you'll learn about the profession's most timely issues, including costing methodologies, ERM (Enterprise Risk Management), performance management, CMA certification, plus helpful on-the-job tips and tools. You can earn more than 20 NASBA approved CPE credits while gaining practical knowledge and skills you can use right away.

Additional information is available online at www.imanet.org

CMA Study Credit

The Heart of Wisconsin Chapter can get credit (chapter points) for the hours you spend studying for the CMA exam. The chapter will get one point for each hour that you spent studying. The maximum number of study hours that can be claimed are the recommended studying hours in the study materials you used for each part. Once you have passed a part, please forward the information below to Admin Team Leader, Jennifer Poggemann via email at jennifer.poggemann@sentry.com

Exam Part: (1, 2, 3 or 4)

Pass Date:

Study Materials Used:

Number of Hours Spent Studying: (Hours claimed cannot exceed the "recommended study hours" in your study materials)



2008-2009

**Heart of Wisconsin
Schedule of
Meetings**

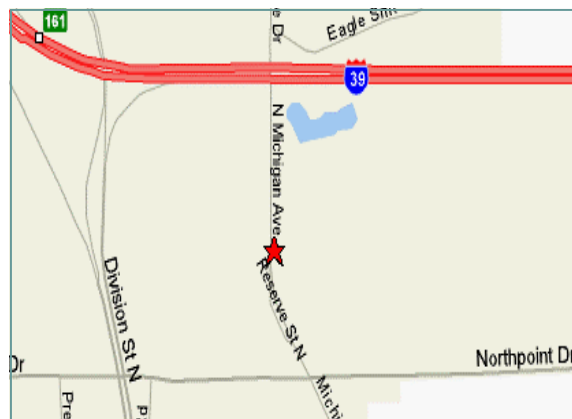
April 21, 2009

Wisconsin Woodchucks
Gulliver's Landing, Wausau

May 19, 2009

Your Personal Financial To-Do-
List
Tony Roma's, Mosinee

Directions—SentryWorld



Sentry World

**601 North Michigan Avenue
Stevens Point**

Take Exit 161 (Business 51). At the traffic lights, turn left on North Point Drive.

Go to the four-way intersection, and take a left onto North Michigan Avenue.

Sentry World is the first driveway on the right hand side.

2008-2009 Board of Directors

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ADMIN TEAM LEADER-**Jennifer Poggemann**

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CO-DIR. ROSTER / BOOKLET

-**Carrie Dreger, Jennifer Cejka**

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PUBLIC RELATIONS-**Open**

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DIR. OF STUDENT ACTIVITIES-**Mary Pierce***

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DIR. OF RETENTION & PARTICIPATION-**Open**

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CO- DIR. OF MEMBER ATTENDANCE -

-**Cody Giese, Evan Schreiner**

DIR. OF EMPLOYMENT - **Open**

Contact info for our board members can be found in the roster booklet, or by going to <http://heartofwi.imanet.org>

*UWSP student

Please contact **Becky Reimer** at becky.reimer@sentry.com or **715.346.7782** if you are interested in fill one of the open positions.

STRAIGHT FROM THE HEART