

May 19, 2009 Dinner Meeting

Your Personal Financial To-Do-List

presented by: Marie Burns, Clifton Gunderson



Imagine implementing nine improvements, one per month, over nine consecutive months. Now imagine the compounded effect of those nine improvements at the end of the year. The results can show you the true potential of incremental gains. The ultimate financial "To Do List" - with just nine improvements you will have more time to focus on enjoying what you truly value in life!

Marie Burns is a Financial Advisor with Clifton Gunderson in Stevens Point. Marie received her BS and MS degrees from the University of Wisconsin—Stevens Point. She is married and has four children between the ages of 12 and 18. she enjoys reading, walking, boating, and cooking. Marie can be contacted by phone at (715) 344-4984 or by e-mail at marie.burns@cliftonfinancial.com.

SPECIAL POINTS OF INTEREST:

- Don't miss the last meeting before summer!
- Free CPE offer!
- 2009 Chapter Challenge!

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Meeting Agenda

Meeting Location: Tony Romas, Mosinee

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: Baby back ribs, baked Mahi Mahi, baked potato, garlic seared green beans, dinner salad, French bread loaves, and a soft drink station. Dessert is Southern Velvet cake.

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

Please make your dinner reservations by noon on Friday, May 15th.

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

Directions—Tony Romas, Mosinee

Tony Romas
1490 County Road XX
Rothschild

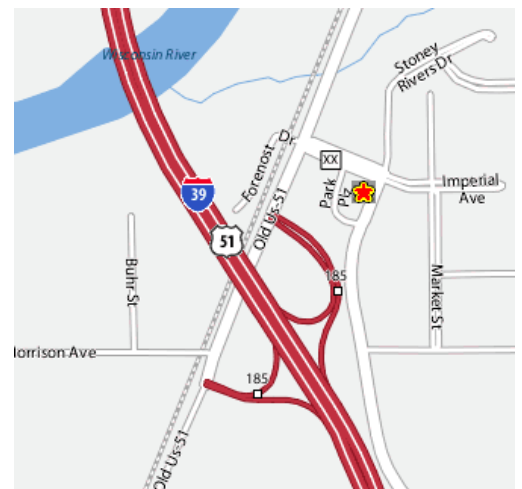
Take I-39 to US-51 Business—Exit 185.

Turn right onto US-51 Business.

Turn right onto County Road XX / Imperial Ave—.1 miles

Turn right onto County Road XX - .1 miles

Arrive at 1490 County Road XX.





**Summer Planning
Dates:**

June 24th

July 21st

August 18

**See page 4 and the
website for details.**

President's Message

Greetings!

This is the last monthly meeting for the fiscal year and I hope that you had a chance to experience the wonderful CPE opportunities and networking events the board has organized. I enjoyed the experience serving as your President.

We still have some positions available for the next fiscal year if you are interested. We will also be conducting our summer planning meetings and the dates will be available on the website. Please feel free to join us.

Please also welcome Jennifer Poggemann as your President for the 2009 – 2010 year. Jennifer has served in several positions on the board and is more than qualified to lead our chapter.

Have a great summer!

Kimberly J. Buehler, CMA, CFM, CPA
President, 2008-2009

Free CPE for Chapter Members!

It seems that someone is always looking for CPE hours to finish out the reporting period. Gleim is offering every Chapter member a 4-hour CPE course (any one in their course catalog) at NO charge!

The Gleim CPE courses are delivered via the Internet, so Chapter members can study when and where it is convenient for them. With the trend towards conserving resources, we know that many training budgets have been reduced. Eliminating travel costs associated with CPE is one of the areas where a Gleim CPE course can be of benefit.

Please have any members wishing to take advantage of this complimentary course email me at chad.murray@gleim.com or call 800.874.5346 ext. 222.

2009 IMA Chapter Challenge

On April 1, IMA launched the 2009 Chapter Challenge . It's a competition designed to bring in as many new members as possible between April 1 and June 1, 2009. The chapter in each category that brings in the most new members, **wins a \$750 cash prize!** To support this effort, the new member application fee will be waived and a special web page will be created at imanet.org/cmc that will contain all necessary program info.



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.

Find more information online at www.imanet.org

Moved? Changed jobs?

Don't forget to keep your profile up to date with the IMA!

Make sure to check the IMA's website to make sure they have your most current information:

www.imanet.org

May Anniversaries

5 Years

Teresa Marek

Summer Planning Meetings



Join the Board of Directors for summer meetings to plan the 2009 – 2010 dinner meetings. Help brainstorm presentation topics, contact presenters, and find meeting locations. The planning meetings will be held at Sentry Insurance, Stevens Point, room G209. Meetings are from 5 to 7 pm with dinner provided. Park on G2 parking ramp (visitor parking) and use @1800 Restaurant entrance.

Wednesday, June 24th

Tuesday, July 21st

Tuesday, August 18th

Please direct questions to Jennifer Poggemann, President 2009—2010, (715) 346 – 6706.

2009-2010 Board of Director Positions Available

The Heart of Wisconsin Chapter has the following openings on its 2009/2010 Board of Directors:

Communications & Community Relations:

- Co-Director Newsletter
- Co-Director Roster/Booklet
- Webmaster

Membership Development:

- Director of Retention & Participation
- Director of Corporate & Academic Development

Board positions require a minimal amount of your time each month. Please considering volunteer your time and If interested in joining, send email inquiries to Lisa Shopinski at Lisa.Shopinski@Sentry.com for more information on open positions.

ADMINISTRATOR & FINANCE

PRESIDENT-**Kimberly Buehler**

ADMIN TEAM LEADER-**Jennifer Poggemann**

SECRETARY-**Arianne Livermore**

TREASURER-**John Vann**

DIR. OF MEETINGS-**Trisha Steines**

DIR. OF STUDENT LEADERSHIP AWARD-**William Maas**

COMMUNICATIONS & COMMUNITY RELATIONS

TEAM LEADER-**Lindsey Watts**

CO-DIR. NEWSLETTER-**Jamie Roelke, Open**

CO-DIR. ROSTER / BOOKLET

-**Carrie Dreger, Jennifer Cejka**

WEBMASTER-**Eric Ledvina**

PUBLIC RELATIONS-**Open**

COMMUNITY SERVICE-**Joel Schult**

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

2008-2009 Board of Directors

MEMBERSHIP DEVELOPMENT

TEAM LEADER-**Kristi Miller**

DIR. OF MEMBER ACQUISITION-**Brian Dewitt**

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

DIR. OF CORP. AND ACADEMIC DEV.-**Open**

CO- DIR. OF MEMBER ATTENDANCE -

Cody Giese, Evan Schreiner

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

*UWSP student