

# MAC

## Mid Atlantic Council



*Delaware ♦ Lancaster ♦ Lehigh Valley ♦ North Penn ♦ Pennsylvania Northeast ♦  
Greater Philadelphia ♦ Reading ♦ South Jersey ♦ Trenton ♦ York*

2006-07

April 5, 2007

Hello Council and Chapter Members:

The Council continues to be very busy in various activities. But the real action is occurring at the chapter level. They continue to provide excellent networking opportunities for our members. Our Chapters are:

**Delaware**  
**Lehigh Valley**  
**North Penn**

**Lancaster**  
**Reading**  
**South Jersey**

**Greater Philadelphia**  
**Pennsylvania Northeast**  
**York**

As you will see in the newsletter, they have various meetings and activities scheduled throughout the remainder of the spring of 2007. I encourage you to attend as many chapter events as you can. Participate in their educational activities. This is also a great time to network with your peers.

The council has been busy with various activities in support of our chapters along with a strong IMA MAC professional education program. We encourage your attendance and participation in the CMA program and most importantly – we encourage you to recruit new members to IMA. In today's challenging marketplace, it is critical for you to be networking with your peers and staying up on the latest financial issues and technology.

We had a very successful WHY? event in early March this year – we hope you had a chance to see us on TV – IMAMAC was mentioned throughout the event – The history of early Philadelphia Kids Television – we even got to meet Sally Starr!!

Our IMA MAC PD's continue to be well presented and attended – thanks to the committee members for all your work.

The IMAMAC CLEW is coming up this April – I encourage the Chapters to have current and future officers and leaders attend this event and learn more about Chapter Best Practices and share ideas with your fellow MAC Chapter officers.

Tim Trout – our President Elect will be presenting more information on our SWOT analysis at this upcoming meeting – which is helping us to prioritize strategic direction and programs for the future.

I look forward to seeing you at an upcoming IMA Chapter meeting and/or an IMA MAC Meeting. I encourage the chapter presidents – and/or your designate(s) to attend an upcoming IMA MAC meeting and update the group on all the great news at your chapter.

Warmest regards.

*Joe Curran*

**President, IMA MAC**

[joecurran@comcast.net](mailto:joecurran@comcast.net)

302-563-7622 (Cell)

**News Flash: Fred Scea has been nominated for Chair Elect of the IMA.**

## Mid Atlantic Council Officers and Directors 2006-2007

President	Joe Curran	<a href="mailto:joseph.t.curran@marsh.com">joseph.t.curran@marsh.com</a>
President - Elect	Tim Trout	<a href="mailto:tptrout3120@verizon.net">tptrout3120@verizon.net</a>
VP- Administration	Joanne Newfield	<a href="mailto:rmcinj@aol.com">rmcinj@aol.com</a>
VP- Education/Prof Development	Amy Snyder	<a href="mailto:amysnyder11@hotmail.com">amysnyder11@hotmail.com</a>
VP- Member Development	Brandon Weinstock	<a href="mailto:brandon.weinstock@verizon.net">brandon.weinstock@verizon.net</a>
VP- Member Relations	Tony Curatola	<a href="mailto:acuratola@comcast.net">acuratola@comcast.net</a>
Secretary (2nd Year of 2004-06 Term)	Fred Root	<a href="mailto:fredroot@comcast.net">fredroot@comcast.net</a>
Treasurer (2 Year Term 2004-06)	Richard Hudson	<a href="mailto:richard.hudson@grahampackaging.com">richard.hudson@grahampackaging.com</a>
Meetings	Kevin Cameron	<a href="mailto:kcameron@gunnip.com">kcameron@gunnip.com</a>
MAC Directory	Tony Curatola	<a href="mailto:acuratola@comcast.net">acuratola@comcast.net</a>
Nominating Committee Chair (2005-06)	Steve Rossi	<a href="mailto:srossi@relevante.com">srossi@relevante.com</a>
National Vice President (2006-07)	Fred Schea	<a href="mailto:fschea@fsbperkasie.com">fschea@fsbperkasie.com</a>

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### Remaining Board Meeting Dates for 2006 - 2007 Year

4/26/07

6:30 pm - Dinner - \$30.00

**Reservations: Kevin Cameron**    [kevinmcameron@comcast.net](mailto:kevinmcameron@comcast.net)

### *Board Meeting location is Vickers Tavern*

CORNER OF E. WELSH POOL RD. and GORDON DR. EXTON, PA - 19341  
TELEPHONE: 610-363-7998 FAX: 610-524-2445

[www.vickerstavern.com](http://www.vickerstavern.com)

### **Directions to Vickers Tavern are as follows:**

**FROM WILMINGTON, DELAWARE** - Take route 202 N and follow to route 100 N. At route 113, you take a right and at the second traffic light (Gordon Drive), you make a right. Vickers is on the right in about 50 yards.

**FROM THE PA TURNPIKE** – Exit at the Downingtown exchange (#312, formerly #23); stay to the right after going through the toll booths, which will put you on route 100 S. Stay to your left on route 100 and in a mile, you will make a left onto route 113. Once on route 113, you will make a right on to Gordon Drive at the second traffic light. Vickers is on the right in about 50 yards.

**FROM KING OF PRUSSIA** - Take route 202 S to the route 401 exit; you need to stay to the right, which puts you on route 401. Follow 401 to route 113 and make a left. Follow route 113 for about 1.5 miles, cross over the turnpike and take a left on to Gordon Drive. Vickers is on the right in about 50 yard.

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## Professional Development Conferences

Contact: Steve Rossi at 215.442-1930 x 106 [srossi@relevante.com](mailto:srossi@relevante.com)

<p><b>IMA MID-ATLANTIC COUNCIL</b></p> <p>Invites You To Attend Our</p> <p><b>Spring Conference</b></p>
<p><i>Sponsored by</i></p> <p> <b>tycor</b><sup>®</sup> <i>est. 1980</i></p> <p>Benefits • Investments • Insurance Confidence in your Plan™</p> <p><i>And</i></p> <p><b>Relevante</b></p>
<p><b>Friday, April 26, 2007</b></p>
<p><b>Vickers Tavern</b> <b>CORNER OF E. WELSH POOL RD. and GORDON DR. EXTON, PA - 19341</b> <b>Exton, PA 19341</b> <b>610-363-7998</b></p>
<p>Adjournment 3:45 PM</p> <p><b>8 CPE Hours</b></p>

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Session	Time/Topic	CPE/FOS	Speaker/Affiliations
	7:15 AM – 7:45 AM	<i>Registration &amp; Continental Breakfast</i>	
1	Long Term Care	1 / Tax	Scott Crane, CLTC of <i>Tycor Benefit Administrators Inc</i>
2	Navigating the Unpredictable World of Investing	1 / SK	Patrick A. Sweeny of <i>Symmetry Partners</i>
3	Business Succession Planning	1 / CS	Jon Corle, CFP, CLU of <i>Tycor Benefit Administrators Inc</i>
4	Qualified Retirement Plan Design	1 / Tax	Brad Wexler, QPA, QKA of <i>Tycor Benefit Administrators Inc</i>
5	Ethics Workshop	2 / E	Connie Davies of <i>Relevante, Inc</i>
6	The Company Legal Audit	2 / CS	Ron Bovarnick, Esquire of <i>Bovarnick and Associates, LLC</i>
	3:45 PM - Close	8	CPE Certificate Distribution

**Note: Field of Study (FOS) abbreviations: A&A = Accounting & Auditing, CS = Consulting Services, E = Ethics, PD = Personal Development, and SK = Specialized Knowledge**

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## IMA MID-ATLANTIC COUNCIL

Invites You To Attend Our

### **Summer Conference**

*Sponsored by*



*and*

## Relevante

**Friday, May 18, 2007**

**Radisson Valley Forge Hotel  
1160 First Avenue  
King of Prussia PA 19046  
610-337-2000**

**Adjournment 3:45 PM**

**8 CPE Hours**

Session	Time/Topic	CPE/FOS	Speaker/Affiliations
	7:15 AM – 7:45 AM		<i>Registration &amp; Continental Breakfast</i>
1	Decision and Risk Analysis	2 / SK	Fred Krumm of <i>Decision Strategies Inc</i>
2	Pulse of Large Enterprise Internal Auditing	1 / A&A	Brandon Weinstock of <b>Relevante, Inc</b>
3	Ins and Outs of Funding Options for Small & Mid-sized Businesses	2 / CS	Steve Bregman of <i>Financial Solutions, LLC</i>
4	Executive Level Briefing on Finance & Financial Measures	1 / CS	Dan Gomez & Mark Nelson, CPA of <i>GGN Group</i>
5	College Planning – How to Pay Less	1 / Tax	Brian Greenberg, CPA of <i>Brian C Greenberg &amp; Assoc, LLC</i>
6	Applying SFAS 157 – Implications for the Corporation	2 / A&A	Al King, CMA, CFM of <i>Marshall &amp; Stevens</i>
	3:45 PM - Close	8	CPE Certificate Distribution

**Note: Field of Study (FOS) abbreviations: A&A = Accounting & Auditing, CS = Consulting Services, E = Ethics, PD = Personal Development, and SK = Specialized Knowledge**

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## [Breaking Council News](#)

It has been reported by a source that wishes not to be identified that **Mr. Fred Schea (our own Fred Schea) has been nominated for Chair Elect of the IMA**. This is fantastic news. Obviously, the North Penn Chapter continues producing leaders. First there was Clair and now there is Fred. Who will be next?

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## **MAC SCHOLARSHIP FUNDS**

MAC has two scholarship funds that are seeking donations –

- **William Courtney Scholarship Fund**
- **John “Jack” Wright, Sr. Memorial Scholarship Fund**

If you would like to contribute – make check payable to MAC IMA - Scholarship Fund and Mail the check to:  
**Richard Hudson, Graham Packaging Company, 2401 Pleasant Valley Road, York, PA 17402**

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## [Upcoming Chapter Events](#)

As of January 8, 2007

**WARNING: I strongly encourage you to check out the chapter’s websites for the latest information as well as the other pertinent information that is made available. Although my staff and I try to provide the best information, it sometimes occurs that we miss the mark. All I can say is that my staff tries.**

## **Delaware Chapter Events**

[www.imadelaware.org](http://www.imadelaware.org)

April Technical Dinner Meeting is scheduled for **Tuesday, April 24, 2007** beginning at 6:00 p.m. at the Terrace at Greenhill, 800 N. DuPont Road, Wilmington, DE. The guest speaker for the evening is Tony Curatola, Joseph Ford Professor of Accounting, Drexel University. Tony’s topic is “**Tax Update**”. Our theme for the evening is “Student Recognition”. **RSVPs** are due to Cindy Vadden at [Cynthia.D.Vadden@usa.dupont.com](mailto:Cynthia.D.Vadden@usa.dupont.com) or 302-999-6415 by **Wednesday, April 18<sup>th</sup>**. The April Door prize is a DuPont Motorsport hat autographed by Jeff Gordon.

**See April for details or go to the website.**

May Technical Dinner Meeting is scheduled for **Tuesday, May 15, 2007** beginning at 6:00 p.m. at the Christiana Hilton, 100 Continental Drive, Newark, DE. The guest speaker for the evening is Jeff Porter and his topic is “**Fraud**”. Our theme for the evening is “Summer in Phoenix”. **RSVPs** are due to Cindy Vadden at [Cynthia.D.Vadden@usa.dupont.com](mailto:Cynthia.D.Vadden@usa.dupont.com) or 302-999-6415.

Be aware that Delaware’s new pricing policy is as follows:

	<b>RSVP</b>	<b>Non-RSVP</b>	<b>Speaker-Only</b>
<b>Student</b>	\$16	\$20	\$5
<b>Member</b>	\$26	\$30	\$10
<i>Non-Member</i>	\$30	\$34	\$10

## Lancaster Chapter Events

[www.lancaster.imanet.org](http://www.lancaster.imanet.org)

**April:** The Lancaster Chapter has a luncheon scheduled for Wednesday, April 18, 2007. The topic for this luncheon is International Micro Lending and the speaker is coming from HOPE International. The speaker will be Peter Greer, President of HOPE International. Topics will include International Micro Lending and HOPE's mission.

4/18/2007 **Lunch** - HOPE International, **Topic:** International Micro Lending, **Cost:** \$15  
**Location:** Holiday Inn, Greenfield Road, Lancaster, PA  
**Time:** 12:00 Noon  
**Reservations:** Call or email Wayne Martin at 717-490-5422, [wlmartin1@verizon.net](mailto:wlmartin1@verizon.net),  
by Friday, April 13<sup>th</sup>.

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## Lehigh Valley Chapter Events

[lehighvalley.imanet.org](http://lehighvalley.imanet.org)

**April:** Thursday, April 12<sup>th</sup> Dinner Meeting is a twofer special. Our speakers will be Donna Goss and Donald Robertson, Co-Directors of the Leadership Development Institute Center for Business & Industry at Northampton Community College and they will be talking on "**Leadership.**" The meeting is being held at NORTHAMPTON COMMUNITY COLLEGE, College Center Building, Room 220 (David A. Reed Community Room) 3835 Green Pond Road, Bethlehem, PA 18020

**Reception 5:30 pm, Dinner 6:00 pm, Session 7:00 pm**

Call the voice mail telephone number 610-794-5114 any time for reservations before **April 8<sup>th</sup>**. You may pay the \$28.00 (\$15.00 for students) at the meeting or send a check payable to the IMA Lehigh Valley Chapter with the form.

If you make a reservation and cannot attend, **you must cancel your reservation by calling the voice mail telephone number 610-794-5114 by 5:30pm on April 11<sup>th</sup> to avoid owing \$28 for the dinner.**

Walk-ins (those making no reservations) will owe \$30.00 (\$15.00 for students) for the dinner.

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## North Penn Chapter Events

[www.northpenn.imanet.org](http://www.northpenn.imanet.org)

**April:** The North Penn Chapter will meet on Tuesday, April 17, 2007. The speaker at this meeting will be Mitchell Chadrow, Esq., Sr. Financial Advisor and Philip Rush, CMA, CFM, Sr. Financial Advisor of Univest National Bank and Trust Company. He will present ***The New Uniform Trust Act and Using Trusts to Build and Manage Wealth.***

**At this meeting, Business Card Exchange will occur between 5:30 pm and 6:30 PM**

### **General Information:**

**Reservations:** Please make your reservations by noon on Monday April 16. Please call 215-273-4998 and leave your name and the number of reservations. Or you may now email your reservation to [northpennima@yahoo.com](mailto:northpennima@yahoo.com) (state whether you are a member, student, or guest, and if you will need a receipt)

**Directions:** Normandy Farms is at the intersection of Morris Road and Rte. 202. It is across Rte 202 from Montgomery County Community College. The entrance is on Morris Road.

**Fellowship** begins at 5:30 PM and dinner is served at 6:30 PM. The technical seminar begins at 7:30 PM. Cost with reservation is \$29.00 for members. Members without reservations and guests pay \$31.00. Student cost is \$15.00. Members are charged for no shows. Please make reservations by noon on Monday by phoning 215-273-4998.

**North Penn IMA McNeal Luncheon:** The North Penn Chapter will meet on Tuesday, May 8, 2007 from 1 to 3. The speaker at this luncheon meeting will be Glen Miller of Performance Essentials, Inc. He will talk on ***Lean Manufacturing.***

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## **Greater Philadelphia Chapter Events**

[www.philaima.imanet.org](http://www.philaima.imanet.org)

The Greater Philadelphia Chapter has scheduled a professional development conference for **Friday, June 15th 2007**. At this conference, the Chapter will host the 4th Annual Widener University Conference on the campus of Widener University. For more information, contact: Joel Wagoner at [joelwagoner@theima.org](mailto:joelwagoner@theima.org) (or 215.572.1395) or Ryan McDonough at [ryanmcdonough@rohmmaas.com](mailto:ryanmcdonough@rohmmaas.com) (215.592.3336).

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## **Reading Chapter Events**

[www.readingima.imanet.org](http://www.readingima.imanet.org)

**April:** The Reading chapter will meet on Tuesday, April 17, 2007. The speaker at this meeting will be Jack Kinsley. He will give a **Personal Improvement Talk – Time, Technology, and Prozac**. This meeting is being held at the Sheraton Hotel – Reading. This is a joint meeting with APCIS and NAPM. Cost is \$25 per person.

**May:** The Reading chapter will meet on Monday, May 14, 2007. The speaker at this meeting will be Mike Ford. He will talk about **MRP in a Lean Environment**. This meeting is being held at the Inn at Moselem Springs, in Fleetwood, PA . This is a joint meeting with APICS, ASQ and NAPM. Cost is \$25 per person.

**May:** The Reading Chapter will host its **Annual “Mates and Dates” Awards Banquet** on Thursday May 10, 2007. The event will recognize the student members and chapter members for their accomplishments through out the year. This banquet will be held at the Berks Career and Technology Center–West Campus, in Leesport, PA. Cost is \$25 per person.

**June: Reading Phillies Baseball Game vs. Binghamton Mets** – Joint networking event hosted by Reading Chapter IMA and APICS ---- June 19, 2007

**July:** The Reading Chapter will host its **Annual Clam Bake** at the Green Valley County Club located in Sinking Spring, PA. This is a Joint networking event with Reading Chapter IMA and APICS. Date TBD

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MAC Newsletter Additions, Corrections (perish the thought), or Suggestions  
Should be sent to Tony Curatola at [acuratola@comcast.com](mailto:acuratola@comcast.com) or (610) 525-5917