



The Association of
Accountants and
Financial Professionals
in Business

Annual Spring Conference
sponsored by
The IMA Northern Lights Regional Council
Thursday April 24 and Friday April 25, 2014
****New Location****

Hilton Garden Inn ~ 1975 Rahnclyff Court ~ Eagan, MN 55122
Up to 16.0 hours of Continuing Professional Education

Thursday, April 24th:

- 7:30 – 8:15** Continental Breakfast, Networking, and Registration
- 8:15 - 8:20** **Welcome and Opening Remarks, Tina Brown, IMA Northern Lights Regional Council President**
- 8:20 – 10:00** **Leadership by the Numbers**, Presented by **Bud Kulesza, Former IMA Chairman**
This presentation covers a variety of approaches to being a successful leader, outlined by various lists prepared by thought leaders as a means of increasing our leadership competencies and effectiveness.
Another high energy presentation filled with humor, example, common sense and plain talk from a presenter who has made this style his hallmark.
- 10:20 – 12:00** **IRS Criminal Investigations**, Presented by **Vicki Petricka, Special Agent IRS-CI**
A presentation by Special Agent Vicki Petricka will outline the involvement of the Criminal Investigations Division of the Internal Revenue Service in a wide variety of tax investigations. She will be providing an outline of what types of tax cases come up in the Division and examples of tax fraud and criminal schemes. Special Agent Petricka will also cover some recent cases that have been investigated by the CI Division and the results.
- 12:00 - 1:00** **Lunch – Provided – Networking**
- 1:00 - 2:40** **Leveraging Technology to Improve Communications and Access to Business Information**, Presented by **Brad Monterio, IMA Board Member**
Management accountants and finance professionals sit at the nexus of business and technology. Today they must be able to leverage technology to perform their jobs well. This session will look at the following; the current environmental factors impacting the use and sharing of business information, key challenges impeding the flow of business information, trends in 'Big Data' and the growing focus back on 'Small Data', the use of Interactive Data (XBRL) to enhance business information, the role of Cloud/SaaS Models for SMEs,
- 3:00 - 4:40** **Business Ethics**, Presented by **Ron James, University of St Thomas Center for Ethical Behavior**
As head of the Center for Ethical Business Cultures at the University of St Thomas, Ron James will be giving us information on how to develop and nurture ethical business practices. He will be giving practical examples and techniques that are used by Ethical Businesses. He will discuss how it is in the best interest of every business to utilize Ethical Business practices and include the impact to the bottom line of an organization. He will also be giving examples of how the CEBC is helping organization with ethical issues.
- 5:10 - 9:30 est. Networking Session – TBD**

Friday, April 25th:

7:30 – 8:15 Continental Breakfast, Networking, and Registration

8:15 - 8:20 **Opening Remarks, Tina Brown, IMA Northern Lights Regional Council President.**

8:20 – 10:00 **Minnesota Economic Health, Presented by Laura Kalambokidis, Minnesota State Economist**

As State Economist Dr. Kalambokidis is uniquely qualified to present information concerning the economic health of Minnesota. She will present information on where the State has been, where we are at, and where we are going in 2014 and beyond. As an educator and researcher she has a completed wide range of economic research on both a state and federal level.

10:20 – 12:00 **COSO and Internal Control, Presented by J. Stephen McNally, Controller Campbell Companies**

Steve was part of the committee that completed and updated the COSO framework as a representative of the IMA. He has an insider's perspective of what went into the update. He will cover the updated COSO framework and the changes from the prior framework. He will give practical examples of how the COSO framework can be used to enhance Internal Controls. He will also discuss some Internal Control techniques that are used in organizations utilizing best practices techniques.

12:00 - 1:00 **Lunch – Provided – Networking**

1:00 - 2:40 **Minnesota Sales Tax Presentation, Presented Sarah Hopkins, Mike Miller & Jim Manson**

A presentation on issues related to Minnesota Sales Tax Rules and Audits. Three professionals from the Department of Revenue of the State of Minnesota will be discussing three critical areas to Minnesota based businesses; 1) current audit techniques being used, 2) current sales tax rules and where businesses can obtain additional specific information regarding rules and regulations and how to apply them, 3) proposed sales tax rules related to collection of sales tax from out of state vendors with a short discussion on nexus.

3:00 - 4:40 **The Risky Business of Corporate Sustainability, Presented by Greg Schu & Brent Olson, McGladrey**

A number of social, economic and environmental risks identified in the sustainability process can have a significant impact on an organization's risk profile resulting in rapid reputational damage or financial loss if not mitigated. Accountants can and should play an important role in considering these risks and related controls as part of the company's risk universe and tracking and reporting sustainability information.

5:00 - 6:00 **Northern Lights Regional Council Meeting, All members are welcome to attend.**

Registration Fee: **\$250.00** for both days, **\$150.00** for one day

- If registration and payment is received by April 1st there is a 10% discount
- Includes continental breakfasts, lunches and breaks
- Networking is **separate**

Register: **By April 10th with attached registration form Pay by April 1st for a 10% discount**

Hotel Reservation: We have negotiated a group rate if you choose to stay at the hotel. Call (651) 686-4605 to make reservations and ask for the Institute of Management group rate.

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