



The Association for
Accountants and
Financial Professionals
in Business

Morris-Essex Chapter

2016-2017 Annual Program and Roster Book

Regular Professional Development Sessions
held on the 3rd Wednesday of every month
from September to May at the
Sheraton Parsippany Hotel
199 Smith Road
Parsippany, NJ 07054
Phone: 973.515.2000

<http://www.sheratonparsippany.com>

Chapter Fellowship and Networking 6:15PM
Dinner 6:45PM
Professional Development Session 7:30PM
Board of Directors Meeting 8:45PM

We encourage our members to sit in on monthly Board meetings
as well as join us for the Chapter Fellowship and Networking time.

www.morrisessex.imanet.org

**Institute of Management Accountants
Morris-Essex Chapter
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**Institute of Management Accountants
Morris-Essex Chapter
President's Message**

Welcome to the 2016-2017 Chapter year for the Morris-Essex Chapter of the IMA!

Fellow Members:

It is an honor and a privilege to serve as President of the Morris-Essex Chapter of the IMA for the 2016-2017 Chapter Year. Our Chapter's Board of Directors has been working diligently over the summer to bring you a quality program this year.

The chapter will continue to host its monthly technical meetings on the third Wednesday of each month. The topics scheduled for this year include a variety of professional development subjects that qualify for Continuing Professional Education credit. We will work in conjunction with other Chapters in our area, as well as our Regional council, to provide service to our members. For up-to-date information, please consult our monthly newsletter or our web page located at <http://www.morrissex.imanet.org>.

I would also like to take this opportunity to encourage you to become more active in the Chapter. Attend our programs, participate in the governance of the Chapter and exercise your leadership and management skills. Contact me or the other members of the Board if you are interested in helping our Chapter continue to grow and thrive.

Please plan on attending the technical sessions. Come out and enjoy the fellowship of your associates on an informal basis during the upcoming year. Participate in one or all of our organized social activities. I can assure you, your commitment of time to the Chapter will be well worthwhile.

Please join me in making sure that 2016-2017 Chapter year is a very successful one for our Chapter!

Respectfully,

Peter C. Giammarinaro

2016-2017 Morris-Essex Chapter President

**Institute of Management Accountants
Morris-Essex Chapter
Internet Links**

Morris-Essex IMA Chapter	morrisessex.imanet.org
NJ IMA Council	njcouncil.imanet.org
Bergen-Rockland-Meadowlands Chapter	brm.imanet.org
North Jersey Shore IMA Chapter	njshore.imanet.org
Princeton IMA Chapter	princeton.imanet.org
Raritan Valley IMA Chapter	raritanvalleyima.imanet.org

Institute of Management Accountants Site includes the following areas and much more...: About IMA Resources & Publications Programs & Events Groups and Networking Your Career Online Store	www.imanet.org
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IMA Application
www.imaonlinestore.com/PersonifyEbusiness/Default.aspx?TabId=180

CMA Certification Learning Center
www.imanet.org/cma-certification

IMA Ethics Center & Helpline
www.imanet.org/tools-and-resources/ethics-center

Statement of Ethical Professional Practice
www.imanet.org/-/media/b6fbbeb74d964e6c9fe654c48456e61f.ashx?la=en

Sheraton Parsippany Hotel
www.sheratonparsippany.com

Look for the Morris-Essex Chapter on Linked-In and Facebook.

Institute of Management Accountants
Morris-Essex Chapter
Monthly Professional Development Dinner Meeting Schedule

The Morris-Essex Chapter will be meeting monthly from September to May. Occasionally, we have joint meetings with various organizations in NJ. All meetings will be held at the Sheraton Parsippany Hotel, unless otherwise noted. ***Please note the changes in location and date for some of the meetings.***

Chapter Meetings

Wednesday, September 21, 2016

Welcome Back

Speaker: Mike Mardy, Tumi Holdings

Topic: Successes and Pitfalls of Leading Companies

Wednesday, October 19, 2016

Past Presidents Recognition

Speakers: John Kirkpatrick and Kevin McCabe, Gallagher Insurance

Topic: ACA and Pensions

Wednesday, November 16, 2016

25- and 50-Year Anniversary Recognition

Speaker: Henry Amoroso, Seton Hall University

Topic: Ethics (2 CPEs)

Wednesday, December 21, 2016

Holiday Social

Speaker: TBA

Topic: Rio Olympics

Wednesday, January 18, 2017

Bring An Associate

Speakers: Dan Gibson, EisnerAmper

Topic: 2017 Tax Update & Predictions

Wednesday, February 15, 2017

CMA Recognition

Speaker: TBA

Topic: TBA

Wednesday, March 15, 2017

Young Professionals

Speaker: TBA, CapitalOne Bank

Topic: Banking Issues

Wednesday, April 19, 2017

Student and Faculty Recognition

Speaker: Vikas Bangia

Topic: Cyber Security

Wednesday, May 17, 2017

Member Recognition

Speaker: Kevin Kilroy, The Linde Group

Topic: Deal Making in the Air and Gas Products Industry

**Institute of Management Accountants
Morris-Essex Chapter
Board of Directors**

President

Peter Giammarinaro, CPA CFP® CMA CGMA
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Assistant Treasurer

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IMA Global Representatives

Global VP

Jennifer Mercer
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Morris Essex Rep

Wore Giotta
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Institute of Management Accountants Morris-Essex Chapter Mission Statement

Provide a forum for education, knowledge sharing, practice development, research, and the advocacy of the highest ethical and best business practices in management accounting and finance in the Morris, Essex, and surrounding counties of New Jersey.

Morris-Essex Chapter Strategic Vision

Impart an informed, valued, professional, and fun experience to all our members, which meets and exceeds their needs and expectations in these areas:

- Certification and preparation for CMA exam
- Continuing professional education, training, and development
- Leadership development
- Networking and public relations with other professional members

Grow regular membership through corporate development, academic relations, and referrals from satisfied members.

How and why we achieve and support our mission and vision

The Morris-Essex IMA Chapter does this with participation of each of our members making the success of our mission possible by:

- Actively promoting and publicizing the CMA designation and activities to achieve it.
- Maintaining regular communications with many old and new corporations of all sizes plus other organizations in our area to create value for them from our peer network, sharing industry best practices and experiences, access to career opportunities, providing educational and training programs to advance professional knowledge, increasing leadership potential, and making business contacts for a lifetime.
- Maintaining regular communications with faculty and students at many colleges and universities in our area to create value for them through student chapters, advocacy for the profession, leading-edge research and industry best practices, and student internship possibilities as well as developing life-long professional contacts and friendships.
- Holding monthly professional development meetings about current accounting and financial topics with experienced and knowledgeable speakers to satisfy CPE requirements, and an opportunity to network with other professionals and students about professional experiences and career opportunities.
- Creating periodic professional development events and sessions, Controller's conferences, career development opportunities, and more.
- Constantly looking for evolving or new alternatives and opportunities to add professional development products that will benefit and help our member's careers in accounting and finance.
- Maintaining for members and potential members an attractive, current, helpful, and informative website and groups on social media sites including LinkedIn and FaceBook.
- Producing for members and potential members an attractive, current, helpful, informative monthly newsletter and electronic roster book.

IMA – About the Profession

The vast majority of accountants and financial professionals—80%, in fact—work inside businesses and organizations. Their work is essential to financial management, organizational development, and the achievement of strategic goals. While external auditing is a very visible part of the accounting profession, sound internal finance and accounting operations are essential for the proper functioning of any organization.

The roles and responsibilities of internal accountants and financial professionals include:

- Managing functions that are critical to business performance
- Supporting organizational management and strategic development
- Providing accurate and insightful information for better decisions
- Ensuring that organizations operate with integrity and proper governance
- Planning for the long-term and helping to ensure sustainability
- Safeguarding the interests of the organization and its key stakeholders

IMA provides advocacy and support for the professionals who perform these vital functions within businesses.

Institute of Management Accountants

Morris-Essex Chapter History

(The evolution from Newark to Essex County to Morristown to Morris-Essex Chapter)

Essex County Chapter (formerly Newark Chapter)

National Association of Cost Accountants initially chartered the *Newark Chapter* on February 21, 1929, after business leaders from the Newark area saw a need to organize and discuss industry's needs on a local basis. The closest chapter at that time was the New York Chapter. The Charter membership of the *Newark Chapter* was 168. James T. Hastings was the first chapter president; he served out the remaining months of the 1928-29 chapter year, and followed with a full term in 1929-30.

The *Newark Chapter* was privileged to have many dedicated and industrious members over the years. Many chapter past presidents went on to serve on the National Board of Directors as officers and directors. Three of our past presidents distinguished themselves as serving as the National Presidents (C. Howard Knapp, Martin A. Moore, and Merwin P. Cassi); eight served as National Vice Presidents; two served as National Treasurer; and one served as National Controller. Numerous past presidents also served as National Directors or on various National Committees.

The first banner won by *Newark Chapter* was in 1936-37. The chapter won 11 banners, the last being in

Morristown Chapter

Shortly following World War II, the County of Morris began to show signs of rapid growth in both its residential and industrial areas. The nearest city of any consequence at the time boasting a chapter (in those years the organization's name was the **National Association of Cost Accountants**) was Newark, NJ. The Newark Chapter (later Essex County) had already sponsored two new Chapters, Paterson and Raritan Valley. However, because of the obvious growth of Morris County it was agreed in the year 1959 an ad hoc committee be designated to investigate the need to charter a Chapter in Morris County. Subsequently, this committee conducted organizational meetings at the Wedgewood Restaurant in Morristown and the Bottlehill Tavern in Madison, at which time they established a target date of September 1959 to achieve the minimum membership requirement of 75 members to qualify as a chapter.

In September 1959, a meeting (which included many members of the Newark and Paterson Chapters) was held at the Morris County Golf Club to discuss the possibility and feasibility of chartering what became the Morristown Chapter. The momentum, which

1961-62. Under the leadership of 1961-62 President Maurice E. Karosen, the chapter also won the Carter trophy. During the 1969-70 chapter year, the name of the chapter changed to **Essex-County Chapter**, to be more responsive to the membership.

The Chapter also had its share of members recognized for authoring superior manuscripts submitted to National. William Langenberg, also a past president, was a prolific writer. He won numerous manuscript awards, including the best manuscript written in any chapter in 1963-64 (Lybrand Gold Medal), the second best manuscript submitted in 1951-52 (Lybrand Gold Medal), and several Certificates of Merit. Other members have also received Certificates of Merit and Certificates of Recognition, while others had their manuscripts published in Management Accounting magazine. Those members are listed immediately following the Chapter history.

The Chapter has been well represented on the Stuart Cameron McLeod Society. Three of our past presidents, C. Howard Knapp, Martin A. Moore, and Russell W. Hardy have served as President of the Society.

followed, brought about the presentation of the Morristown Chapter on January 6, 1960 by National Vice President Merwin Cass. Highlighting the significant occasion was the presence of former Governor Alfred E. Driscoll who delivered the main address. At the time, William F. Gerth was accorded the distinction of being elected as the first Chapter President with 140 Chapter members in attendance.

The Chapter was afforded an excellent opportunity to bring to the public forefront the philosophies and purposes of the IMA, then known as the **National Association of Accountants**, when it volunteered to perform an audit function for the St. Barnabas Hospital Building Fund. The Chapter's image was further enhanced when individual members volunteered their services with personal income tax assistance.

The ensuing years have reflected other gratifying accomplishments for the Chapter. The Morristown chapter received a Stevenson Competition Banner on three occasions. In the year 1960-61, it placed 14th out of the top 20 award-winning chapters, in 1965-66, it placed 17th, and in 1968-69, it placed 19th.

Institute of Management Accountants Morris-Essex Chapter History (cont.)

A number of Chapter members have authored articles, which have been published in the Institute's magazine, Management Accounting. These distinguished members and authors are listed at the end of the Chapter History, along with members of the Essex and Morris-Essex Chapters.

The highly successful North Jersey Business Show has been an annual event since it was conceived by the Chapter as a management ideas showcase. Organizing and administering the Show continues to be one of the Chapter's outstanding functions. The show accomplishes two basic goals: it makes available at one location all the latest competitive equipment for the convenience of the community and it produces revenue necessary to support Chapter functions. The first show was held at the Morris County Golf Club in 1961, with four exhibitors, in conjunction with the regular monthly dinner meeting. As the Show expanded, the need for larger space became evident and, in 1966, the first large Show was held at the Governor Morris Inn in Morristown, at which 40 exhibitors drew a crowd of 1,700 visitors. In ensuing years the number of exhibitors averaged forty-two. As the show continued to grow, the need for larger quarters became evident and, in 1979, the largest Show was held at the Birchwood Manor in Whippany, with 60 exhibitors occupying booths and the visitor attendance in excess of two thousand. In 1982, the Show moved to the new Hilton Hotel in Parsippany and was well received by the exhibitors and attendees. The Show is currently held at the Birchwood Manor in Whippany.

The Chapter sponsors an annual Golf Outing and other activities, which bring the membership together in a spirit of good fellowship.

One dinner meeting is set aside each year to honor the Chapter's past presidents. The Roster book lists the past presidents since inception of the Chapter.

In September 1960 one of our members, Joseph L. Pelej, Sr. (deceased) was awarded Emeritus Life Associate. The Chapter had been in existence for less than a year when we had the honor of presenting him with this award. To qualify for Emeritus Life Associate, the By-laws of the Institute provide that a member of the institute having retired from active business may be relieved of the obligations of active membership. Such Associates may be relieved from payment of all or any portion of the annual dues and may receive services of the Institute in accordance with such rules and procedures as shall be established by the Board of Directors. Emeritus Life Associates shall not be permitted to vote or hold National office. By action of

the National board of Directors effective as of July 1, 1965, the designation of Emeritus Life Associates will be made available to retired members who have had twenty years of active service, or ten years of active service including five years as an elected national or chapter officer or director. Since presenting Mr. Pelej with his award, we have had the honor of awarding many additional members Emeritus Life Associate status.

In 1961, members of our Board met with representatives from National Headquarters and two other chapters to discuss the possibility of experimentation with educational seminars. The Chapter decided it would attempt to run a seminar that year, and it was very successful. An open "nuts and bolts" type workshop session with a small group, after a seminar leader has presented his topics, has proven to be an excellent media of communications and exchanging professional ideas. Morris-Essex's Professional Development seminars have continued to be quite successful. IMA National headquarters has also expanded its continuing education program to meet the educational needs of all members throughout the year.

Our first triumph in inter-chapter competition occurred in the 1961-62 Chapter year when we topped Trenton. Books awarded us by National for this success were donated to the Fairleigh Dickinson University Library in Madison, NJ. Since that accomplishment, we have usually won out over our friendly rival, the Raritan Valley Chapter, in inter-chapter competition.

The Chapter instituted a Merit Award Plan in 1964-65 to recognize special effort and achievement of our members. The Merit Award winners appear following this chapter history.

In 1967, recognition for top accounting students graduating from various high schools in the area was initiated and was intended to be awarded annually. In 1974, the Chapter upgraded this program by awarding a scholarship to one of those students. In 1977, the program was again upgraded by awarding of a scholarship to a college student pursuing a business career. This program again expanded to include recognition of top accounting students graduating from up to 25 schools in the area. The students are presented with both a certificate of recognition in accounting, known as the gold key award and a bond. The scholarship program also expanded to permit the Chapter to provide up to three scholarships to college students pursuing an accounting career. These programs continue and will hopefully continue to grow.

Institute of Management Accountants Morris-Essex Chapter History (cont.)

During the 1972-73 Chapter year, a night to honor our Associate Directors was designated. Associate Directors are all-important in establishing a successful chapter. These members are instrumental in formulating and carrying out our Chapter activities and are the people who go on to become Directors and Officers of the Chapter.

During the 1973-74 Chapter year, a new program was instituted to recognize the contributions to the Chapter by those members who were neither officers nor directors. This allowed all members to participate more fully and to be recognized for their efforts.

Morris-Essex Chapter

The Morris-Essex Chapter was formed effective June 1, 1985 through the merger of the Morristown and Essex County Chapters.

One of the highlights of our Chapter was the presidency of Eileen Redfern in 1990-91. Not only did Eileen win a Chapter banner by placing ninth in the overall Chapter competition for the year, but she also brought home the Carter Trophy. This trophy is awarded to the Chapter showing the most improvement during the Chapter year, as compared to its prior two years. Also, in 1991 the **National Association of Accountants** changed its name to the **Institute of Management Accountants**.

Membership is kept abreast of all happenings in the Chapter through the monthly newsletter, the Morris-

Those members have been recognized as Distinguished Service Award winners and their names appear directly following this chapter history.

One of the members of our Chapter, Andrew J. Michaels, had 100% attendance at all Chapter technical meetings and seminars since the Chapter was chartered in 1959, through and including 1991-92.

In 1981, Mr. Robert L. Shultis, a past president of the Chapter, was appointed Executive Director of the IMA, then the National Association of Accountants.

Essex Crier. This publication advises the Chapter members of upcoming events, dinner meeting speakers and topics, personal notes and accomplishments, national announcements, professional development seminars, and other items of interest.

Through 1995, we continued sponsoring the highly successful North Jersey Business Show. Local businesses exhibit the latest competitive equipment available for the profession, and professional seminars were conducted at the site the last several years. At some point between 1995 and 2008, NJ Biz became responsible for this show and currently conducts it at the Birchwood Manor in Whippany in the September.

We are currently collecting information about Chapter history between 1995 and 1999 and hope to have this completed by the Fall of 2015.

Anthony Berlangieri began two years as President in 1998. The 1999-2000 accomplishments included surviving the millennium Y2K computer bug. With everyone's help, Morris-Essex finished 32nd in the National competition (Stevens Division). Meetings included a broad spectrum of speakers, topics, and programs. The Chapter presented William J. O'Mara of CIT Equipment Financing with the Financial Executive of the Year award in April 2000. Charlie Rall continuously updated the website to deliver instantaneous information. The Chapter provided an open forum for relevant news and new ideas to benefit members. Membership included a diverse representation of Fortune 500 corporations, "Big 5" Public Accounting firms, and small to medium size companies.

Ed Kaye followed Anthony in the 2000-2001 Chapter year. Ed's number one priority was membership growth and retention through emphasis on certification, contacts, tradition, leadership,

communications, and social activities. Professional development meetings included topics about venture capital, e-commerce, banking, and insight into Sports Accounting by Jack Cust, CFO for the Somerset Patriots. The Chapter presented Beth Anne Connelly, VP of Operations and Systems at the Prudential Insurance Company of America with the Financial Executive of the Year award in April 2001. The year ended with a presentation about White Collar Crime by an official from the FBI.

Peter C. Giammarinaro was Chapter President for the next two years. For 2001-02, the Chapter continued the Palm Pilot contest, which awarded a Palm Pilot to the member who signed up the most new members during the Chapter year. In addition, a business card drawing began with a \$20 coupon toward a future Chapter meeting and awards of \$5 discounts for advance registration at meetings began. Professional Development meetings included a Tax Update provided by Kenn Heaslip, CPA, Estate and Financial

Institute of Management Accountants Morris-Essex Chapter History (cont.)

Planning, Career Planning, and many others. The Chapter presented Lawrence H. Schaefer, CFO, Myron Corporation with the Financial Executive of the Year award in April 2002.

During the 2002-2003 Chapter year, the Board discussed changing the location and day of the professional development meetings to generate additional member participation. "The Crier" continued to be an important source of information for all members. To help the Chapter grow, three new members voluntarily joined the Board: Diann Pinkowski, Chris Walters, and Marty Harte. Some of the Professional Development meeting topics included Disaster Recovery, Forensic Accounting, and How to Prepare a Business Plan. Peter's wife Patricia spoke at the Holiday Cheer meeting about Continuing Care Retirement Community (CCRC) Living. The Chapter presented Glenn E. Tynan, VP of Finance and CFO, Curtiss-Wright Corporation with the Financial Executive of the Year award in April 2003.

In 2003, Paul Natalizio IV became Chapter President and he was so successful he remained President for three years. During this period, the Board undertook many changes to improve the Chapter. The Chapter initiated, the Season Pass to allow members to attend seven of our monthly meetings for the price of six. Our chapter meeting location changed from the Hanover Manor to the Ramada Conference Center in 2003, however we changed back to the Hanover Manor in 2005. In April 2004, we awarded our final Financial Executive of the Year award to Martin Latman, VP of Finance and CFO, New Jersey Symphony Orchestra. We began helping save the environment by e-mailing our monthly newsletter and by posting the Roster Book on our website instead of printing and mailing it. We scheduled many joint meetings during those years with West Jersey APICS, the Financial Women's Association, and the Raritan Valley IMA Chapter. During a 2005 joint meeting with the Raritan Valley Chapter, Paul Sharman, IMA CEO at the time, spoke to both chapters on "Management Accounting as a Profession."

In 2006, Chapter President Diann Pinkowski introduced members to new friends by having joint meetings with other organizations like APICS, the American Payroll Association, Bergen-Rockland Meadowlands, and Raritan Valley IMA Chapters. Kenn Heaslip returned to give a comprehensive tax update presentation and National's Paul Sharman talked about Management Accounting at a couple combined meetings. Diann, while promoting the IMA, challenged members to pursue the CMA and CFM

designations along with adding to their leadership skills by joining the Chapter's Board of Directors.

In 2007, Bill Barish began two years as Chapter President. During his tenure, professional development meetings included presentations on relevant management accounting topics and issues like Sarbanes-Oxley. There were many opportunities to network with fellow members. The year began with a joint meeting with the Financial Women's Association about SBA financing opportunities. Steven Lord, CMA, CFM of Lord Knows! treated attendees at the December Holiday meeting to another one of his very humorous and informative presentations. During Bill's second year as President, Mr. Donald Phillips started getting involved in the Chapter and the Board and the momentum began to grow.

In 2009, during one of the worst economic times and financial crisis, Chapter President Bill Grammaticas began another effort to revive attendance at our professional development meetings by having the Board use a monthly call list, providing relevant topics, and more networking time. Attendance began to increase, but more importantly, reaching out to members began a reconnecting and nurturing process. The Board was listening and talking or emailing with members about their interests, the benefits of IMA and Chapter membership, the benefits of receiving the CMA designation, and the fun we have.

In 2010-11, the Chapter built on the successes that began the year before. It started with Chapter President Don Phillips' program to reach out to corporations (12 were added to our list) and colleges (7 were added to our list and we met with professors at four) to attract people interested in professional development. Seton Hall University Professor Mark Holtzman responded and invited IMA National and Chapter Leadership members to meet with students to explain about the IMA and the CMA program. This was followed by the County College of Morris deciding to offer CMA Prep courses. Vice President and Controller of Quest Diagnostics, Tom Bongiorno, issued the following challenge to his staff: if you invest in your career by becoming a CMA, Quest will financially invest in support of your efforts. Thirteen accounting and financial associates took up the challenge. During the year, we found we were rebuilding old relationships that were lost by providing new information to contacts about the IMA and the CMA program. It became apparent this could not be a one-and-done effort, since the IMA and the Morris-Essex Chapter want to be lifelong partners developing the next generation of accounting and finance professionals. It needs to be a patient and sustained

Institute of Management Accountants Morris-Essex Chapter History (cont.)

effort. Our newsletter and the monthly email and postal mail lists facilitated greatly these efforts by adding speakers and new contacts to both along with monthly updates. We could not have done all this without the terrific help of many people along with electronic and printed resources provided by IMA National headquarters in Montvale and a few other IMA Chapters.

We added several new tabs to our web site to help all our members with employment and more. New articles, graphics, and pictures were added to our newsletter, which emphasized our more modern focus and mission and attracted new advertising revenue. By the end of the year, the newsletter grew from two to six pages. In addition, we started to advertise our meetings with local newspapers again. We learned most of them had web sites with calendars of events and they selected events to promote in their local papers from the web site calendars, so we posted our professional development meetings on their web sites. Towards the end of the year, we were fortunate to have WMTR, a Morris County radio station, provide public service announcements about our meetings, too. We also learned Comcast TV would run a one-page slide about our professional development meetings as a public service announcement. We hope to use TV in future years.

Our Professional Development meetings were packed with outstanding speakers like Danny Wood, Professor Rick Gentile (CBS Sports and Olympic coverage Producer), a Plant tour of Quest Diagnostics Lab facility in Teterboro, NJ, and six other speakers with informative topics such as aids to small business, non-profit planning, cloud computing, audit, and taxation.

The Morris-Essex Chapter started a clothing drop-off service project with the North Jersey Red Cross in Fairfield, NJ before year end. In the spring, we attempted a broader service project with the North Jersey Red Cross to collect financial donations for relief and rebuilding efforts in the wake of the earthquake and tsunami in Japan followed closely by heavy spring flooding in Northern NJ and tornadoes and heavy rain in the Midwest. In each case, working through the Red Cross we were helping members of our Chapter as well as around the country and the world to recover from devastating damage and loss.

In 2011-12, William Barish and Paul Natalizio IV acted as co-Presidents for the Chapter year. The year was highlighted by some great speakers. Prof. Rief Kanan kicked off the year by providing an entertaining ethics presentation. Robert Hopper's presentation on Profitability Enhancement was so well received that he was tapped by the IMA to headline a webinar open to

all IMA members later in the Chapter year. Marty Latman of the Bergen Chapter of the Financial Executive Networking Group provided 2 CPEs to help our members better understand networking and personal branding. Gerald Najarian provided a thorough talk on Throughput Accounting – The New Management Accounting. The focus on Management Accounting topics during the year allowed the Chapter to drive our mission to provide management accounting education to our members. At the conclusion of the Chapter year, our Chapter won awards from the IMA for Public Relations and Community Service at the Annual Conference held in Las Vegas, continuing the momentum started by Don Phillips last year.

Change and growth on many levels were the highlights of the 2012-13 year. Planning began in May with President Candace Levine, a former President of Cincinnati North IMA Chapter, starting to find some terrific speakers for our monthly Professional Development Meetings. She was helped by another volunteer from Quest Diagnostics, Joydip Bandyopadhyay. Unfortunately, by September, Candace had to leave Quest and move back to Cincinnati. The Presidency of the Chapter quickly transitioned to President-Elect Jacqueline Begraft. With some guidance from some of our experienced Past Presidents, Jacqueline did a fine job as our President. As a result, the Chapter ended up with second place in the Public Relations competition and third place in the Newsletter competition. This was the first time our newsletter has been recognized, and we congratulate Manish Shah for volunteering to pick up this important responsibility and doing an outstanding job with the Newsletter.

One of the reasons for success in our public relations efforts was Diann Pinkowski and the College Relations Team. In the fall, at the request of Professor Gail Fraser, Diann made a presentation to the students at Kean University. Towards the end of the year, Kean invited Diann back to for a campus fair and one-on-one presentation. Professor Bert Wailoo at Kean provided additional support to our efforts at the University throughout the year.

In addition, throughout the year Diann and Don Phillips talked with Montclair State University Professors Steve Markoff and James Yang about various opportunities for students. In the spring semester, Diann, Don, and Robert Ewalt visited an MSU Accounting Society meeting and gave a presentation about the benefits of IMA membership, the CMA program, and our Chapter.

During the year, both schools had students attend our

Institute of Management Accountants Morris-Essex Chapter History (cont.)

professional development meetings. At our CMA/CFM Recognition Night meeting over 30 undergraduate and graduate students from Kean University attended and were part of the total attendance of 55 (this was our largest attendance in many years). In April, after Marty Latman gave us another very energetic and informative presentation about interviewing and resumes, one of the students was overheard to say to his friend, "This presentation was worth more than the cost tonight!" and the friend agreed. This is just one example of how active the Chapter has become and how we continue to provide outstanding professional development meetings for networking and lifelong learning.

In 2013-2014, Bill Grammaticas took his third turn as President of an IMA chapter. It was quite an eventful year. The Chapter was recognized at the annual convention with the Global Gold medal for Public Relations and finished as a runner up in Community Service. On top of that, the Chapter finished 21st in the Global Chapter Competition, the highest finish since 1990. The strong board and volunteers developed strategic initiatives to engage corporations, colleges, and our chapter members in professional development. One highlight was CMA recognition night featuring Global CEO Jeff Thomson and Dennis Whitney participating in the awards ceremony for CMA's with longevity from 5 to 40 years. Dr. James Yang from Montclair State University (40 years) and Thomas Bongiorno from Quest Diagnostics (35 years) received awards for longevity as a CMA.

The college relations team of Don Phillips, Diann Pinkowski, Anthony Sellitto, Tom Bongiorno, Al Shandler and Robert Ewalt reached out to a number of colleges this year including Seton Hall, Rutgers, William Patterson, Caldwell College, NJIT, Kean, and Bloomfield College. A number of students attended our chapter professional development dinner meetings, expressed interest in starting a student chapter, and learned about the CMA. We advised a number of students about approaches to landing an internship, developing a quality resume, and getting involved.

The corporate development team helped promote the CMA program to Horizon BlueCross Blue Shield's CFO, Controller, and Director of Planning and Analysis. Other corporations have expressed an interest in hearing our message this upcoming fall.

The dinner meetings this year produced higher attendance as well as active participation in the program. The new venue, Sheraton Parsippany, gave us ample space, flexibility, and a nice buffet. We also were proud of the new Chapter members and CMAs.



MSU Professor James Yang, CMA receives 40-year award and applause from Chapter President Bill Grammaticas, ICMA Sr. VP Dennis Whitney, and IMA President & CEO Jeff Thomson.



2013-14 Public Relations Gold Medal and Community Service Certificate awards.



Quest Diagnostics VP, Controller, & CAO Tom Bongiorno receives 35-year award from Chapter President Bill Grammaticas, ICMA Sr. VP Dennis Whitney, and IMA President & CEO Jeff Thomson.



Anthony Sellitto and Karen Schoenebeck's NJIT students listen to presentation about IMA, CMA, and Chapter.



Presentation involving Alan Shandler, Robert Ewalt, & Tom Bongiorno to Beta Alpha Psi students and Dr. Mest at Seton Hall University.



Diann Pinkowski involved with presentation to Dr. Muroki Mwaura's students at William Paterson University.

Institute of Management Accountants Morris-Essex Chapter Awards

There are many leaders of all ages currently within the membership who can put forth their knowledge, energy, and leadership, to maintain the Morris-Essex Chapter as a leading contender for a Banner. Some of those who did this in the past are listed below:

Chapter Merit Award Winners

1964-65

Andrew J. Michaels
Francis M. Mastromano

1965-66

Paul E. Schempp
Eldon M. Dixon

1966-67

James Varga
George N. Sabo

1967-68

Armand M. Kaplan
Fred Meckel, Jr.
Francis J. Mejstrick
Gordon S. Owren
G. David Woosley

1968-69

Robert J. Amses
Rudolph J. Thurnes
B. Zamrock, Jr.

1969-70

Donald G. Chaump
William M. Mahoney
James G. Sullivan

1970-71

Robert Tappen
F. W. Laird Terhune, Jr.

1971-72

William F. Allen
Eldon M. Dixon
Daniel J. Fineran, Jr.
Charles A. Loeffler
Gordon S. Owen
Peter J. Pelos

1972-73

Betty S. Celler
Peter J. Veritas, Jr.

1973-74

James T. Clinton
Richard G. Light
Charles A. Loeffler
Rudolph J. Thurnes

1974-75

Arthur V. Corr
Marjorie D. Coleman
Daniel J. Fineran, Jr.
Charles J. Stancel
Bernard Stelmach

1975-76

Saul Dersh
Thomas X. Hennigan
Richard G. Light
Andrew J. Michaels

1976-77

Terrance Boyne
James T. Clinton
Robert Giordano
Frank W. Kompany
Walter Schmiedeskamp

1977-78

Daniel J. Fineran, Jr.
Angelo R. Rizzo
Bernard Stelmach
Rudolph J. Thurnes

1978-79

J. David Gill
Priscilla Florindi
Thomas X. Hennigan
Andrew J. Michaels

1979-80

Kevin McGonigle
James Murphy
Walter Schmiedeskamp

1980-81

Robert Campbell
Saul Dersh
Martin DuBell

1981-82

Lynn Albala
Priscilla Florindi
J. David Gill
Thomas X. Hennigan
Andrew J. Michaels

Chapter Distinguished Service Award Winners

A new program honoring members for their overall contributions to the Chapter began in the 1973-74 Chapter year. The program is intended to be an annual event and is designed to exclude all officers and directors of the Chapter.

1973-74

Anthony J. Corisi II
Frank W. Kompany

Robert V. Yanashusky

1974-75

J. Richard Chaplin
Steven A. Karnas
Anthony Mita

Michael A. Petrock
Laverne Wolfanger, Jr.

1975-76

John Crane
Peter Gelcius
James H. Goodwin

Rocco P. Manuele
Michael A. Petrock
James Wood

1976-77

Frank Kompany
Robert J. Giordano
Brian W. Rollin

Ruth Vogler
Joseph H. Kressman, Jr.
Harriet Peters

1977-78

Robert J. Giordano
Frank Kompany
Joseph H. Kressman, Jr.

Harriet Peters
Brian W. Rollin
Ruth Vogler

1978-79

Andrew Huber

Joseph H. Kressman, Jr.

1981-82

Susan Kaweske

1982-83

Susan Kaweske

Institute of Management Accountants Morris-Essex Chapter Awards (cont.)

National Chapter Achievements and Awards

Achievements and awards received by the Morris-Essex Chapter (formerly Essex County Chapter (formerly Newark Chapter) and the Morristown Chapter).

Chapter Awards

Carter Trophy (Year and President)

1961-62	Maurice E. Karosen		1990-91	Eileen Redfern
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Banners (Year, Standing and President)

1936-37	11 th	Martin A. Moore		1954-55	19 th	Henry A. Wegener
1938-39	10 th	William H. Slavin		1956-57	15 th	Russell W. Hardy
1939-40	14 th	Stanley A. Bronner		1960-61	14 th	Stanley M. Babson, Jr.
1940-41	14 th	Otto L. Straub		1961-62	6 th	Maurice E. Karosen
1942-43	14 th	George E. Hallett		1965-66	17 th	Francis M. Mastromano
1945-46	6 th	Nicholas St. Peter		1968-69	19 th	Paul E. Schempp
1948-49	20 th	David B. Caminez		1990-91	9 th	Eileen Redfern
1953-54	11 th	William Langenberg		1997-98	22 nd	Charles S. Rall

Public Relations Award (Year, Place, and President)

2010-11	1 st Gold	Donald M. Phillips		2013-14	1 st Gold	Bill Grammaticas
2011-12	1 st Gold	Paul Natalizio IV & William Barish		2014-15	1 st Gold	Alan Shandler
2012-13	2 nd Silver	Candace Levine & Jacqueline Begraft		2015-16	3 rd Bronze	George Maniatty

Alden Pendleton Award for Community Service (Year, Place, and President)

2010-11	3 rd Bronze	Donald M. Phillips		2014-15	2 nd Silver	Alan Shandler
2011-12	3 rd Bronze	Paul Natalizio IV & William Barish		2015-16	2 nd Silver	George Maniatty
2013-14	2 nd Silver	Bill Grammaticas				

Newsletter Award (Year, Place, and President)

2012-13	3 rd Bronze	Candace Levine & Jacqueline Begraft
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Lybrand Manuscript Awards

Individual awards were presented to the following members in recognition of the superior manuscripts submitted through the Chapter.

1951-52	2 nd Silver	William Langenberg		1965-66	3 rd Bronze	Donald Chaump
1963-64	1 st Gold	William Langenberg		1979-80	1 st Gold	Francis M. Mastromano

Certificates of Merit (Year and Member)

1949-50	James F. Merrick		1964-65	Alexander Bence
1950-51	L. Chauncey Lewan		1967-68	Robert L. Shultis
1951-52	William Langenberg		1967-68	Robert E. Healy (Essex & Bergen-Rockland Mbr.)
1952-53	William Langenberg		1970-71	Francis M. Mastromano
1953-54	Martin A. Moore		1970-71	Irving L. Fantl
1954-55	William Langenberg		1991-92	Frank Zolfo
1963-64	William Langenberg		1991-92	Stephen F. Cooper

Certificate of Recognition (Year and Member)

1969-70	Edward M. Milko
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These Chapter members authored manuscripts published in the Institute's magazine, Management Accounting:

Wagdy M. Abdallah (twice)	Gary Brenning	Robert Giordano	Andrew Michaels
Stanley M. Babson, Jr.	Donald Brightley	Les Johnson	George Watt
Robert W. Backes	Arthur V. Corr	Maurice E. Karosen	Gilbert Yang
Richard F. Berk	Harold Fox	Frank Mejstrick	

Institute of Management Accountants Morris-Essex Chapter Awards (cont.)

Stuart Cameron McLeod Society

Members in the Stuart Cameron McLeod Society (SCMS) consist of current and past national officers and directors of the Institute of Management Accountants. The purpose of the SCMS is to promote and perpetuate friendships developed through service in IMA. It also provides an opportunity for its members through their interest and experience, to offer leadership and guidance in the development, growth and expansion of the Institute of Management Accountants.

The SCMS was formed in 1934 as the Spot Club. In 1957, the name was changed in recognition of Stuart Cameron McLeod, one of the founders of the Spot Club

and Executive Secretary of the IMA from 1919 until his death in 1944.

The Trophy awarded to the third place chapter in the Stevenson competition is sponsored by the SCMS. The Society also sponsors the "S. Alden Pendleton Award for excellence in the Community Responsibility Program of the IMA." In addition, the Society provides judges for the selection of the recipients of the Stuart Cameron and Margaret McLeod Scholarships.

SCMS is also known as the "Society for Continuing Membership Services." This describes your fellow chapter members who are active members of the Stuart Cameron McLeod Society.

The following SCMS members are current Chapter members:

William M. Barish

Peter C. Giammarinaro

The following past chapter members also were SCMS members:

Casper B. Apple	Russell W. Hardy	Martin A. Moore	Walter D. Schmiedescamp
Frank L. Barrington, Jr.	James J. Hastings	Raymond N. Neu	Robert L. Shultis
Stanley Z. Bronner	Thomas X Hennigan	Eugene R. Nevins	Nicholas St. Peter
David B. Caminez	Mary E. Johnson	Thomas F. Quinlan	Nicholas R. Sucic
Ernest A. Carlson	Marice E. Karosen	W. W. Ragsdale, Jr.	Donald J. Trawicki
Merwin P. Cass	C. Howard Knapp	Eileen Redfern	George C. Watt
Frank J. Church	William Langenberg	Arnold W. Rhinesmith	Robert G. Weiss
Frank L. Esposito	George C. Lyon	Duncan D. Richardson	Henry A. Wegener
Priscilla G. Glorindi	Robert R. Meyer	Paul E. Schempp	James A. Wilson
George E. Hallett	Andrew J. Michaels	Walter W. Scheuplein	

Institute of Management Accountants Morris-Essex Chapter Service History

Service on National Board and Committees

Through the years, members of the Chapter have distinguished themselves on the National level by service on the National board and various National Committees. The following is a list of those members:

National Officers and Board Members (Member and Capacity)

Casper B. Apple	Vice President	Francis J. Mejstrick	Vice President, Director
Stanley M. Babson, Jr.	Director	Robert R. Meyer	VP, Director, Executive Comm.
Robert W. Backes	Director	Martin A. Moore	President, VP, Director
Merwin P. Cass	President, VP, Treasurer	James Murphy	Director
Frank Church	Vice President	Dennis L. Neider	Vice President, Director
Pricilla Florindi	Director	Duncan D. Richardson	Vice President, Director
William M. Gerth	Director	Walter Schmiedeskamp	Vice President, Director
George E. Hallett	Vice President	Robert Shultis	Director
Russell W. Hardy	Controller	Nicholas St. Peter	Vice President
Thomas X. Hennigan	Vice President, Director	Nicolas R. Sucic	Director
Mary E. Johnston	Director	Donald Trawicki	Director
Maurice E. Karosen	Director	George C. Watt	Director
C. Howard Knapp	President, Vice President	Robert Weiss	Vice President
Francis M. Mastromano	Director	Bron Zamrok, Jr.	Vice President, Director

National Committees (Member and Capacity)

Robert W. Backes	Management Acct Practices	Andrew J. Michaels	Public Relations
Richard F. Berk	Management Acct Practices	James J. Murphy, Jr.	Membership & Marketing
Pricilla Florindi	Public Relations, Education	Dennis L. Neider	Chapter Operations
Julian Freedman	EDP	Eileen Redfern	Membership & Marketing
Thomas X. Hennigan	Chap Ops, Membership & Mktg	Walter Schmiedeskamp	Chap Ops, Membership & Mktg
Joseph Ianco	Membership & Marketing	Bernard Stelmach	Education
Mary E. Johnston	Community Service	Nicolas R. Sucic	Chapter Operations
Armand M. Kaplan	Education	George C. Watt	Grant in Aid, Research & Plan
Francis M. Mastromano	Planning, Finance	Robert Weiss	Management Acct Practices
Francis J. Mejstrick	Executive Comm & Chapter	Bron Zamrok, Jr.	Finance

Institute of Management Accountants Morris-Essex Chapter Competition History

Yearly Membership and Chapter Competition Standings: (Year, Membership as of the beginning of the competition year (June 1st) Final Competition Standing, President)

Newark Chapter

1928-29	0	34 th	James J. Hastings	1944-45	423	28 th	Casper B. Apple
1929-30	184	31 st	James J. Hastings	1945-46	509	6 th	Nicholas St. Peter
1930-31	191	29 th	C. Howard Knapp	1946-47	560	17 th	F. Gerald Hawthorne
1931-32	200	31 st	Howard H. Eckert	1947-48	530	43 rd	Herbert Thorpe
1932-33	152	30 th	Thomas L. Evans	1948-49	522	20 th	David B. Caminez
1933-34	146	24 th	Edwin E. Salt	1949-50	559	39 th	Merwin P. Cass
1934-35	144	28 th	Duncan D. Richardson	1950-51	596	67 th	Ernest A. Carlson
1935-36	124	35 th	Rudolph J. Wehrli	1951-52	598	74 th	Franklin L. Mettler
1936-37	154	11 th	Martin A. Moore	1952-53	614	22 nd	Arnold W. Rhinesmith
1937-38	167	25 th	Raymond W. Ludlow	1953-54	671	11 th	William Langenberg
1938-39	192	10 th	William H. Slavin	1954-55	764	19 th	Henry A. Wegener
1939-40	216	14 th	Stanley Z. Bronner	1955-56	644	29 th	Frank L. Esposito
1940-41	237	14 th	Otto L. Straub	1956-57	660	15 th	Russell W. Hardy
1941-42	269	18 th	William D. Knapp	1957-58	729	72 nd	Walter W. Scheuplein
1942-43	305	14 th	George E. Hallet	1958-59	740	118 th	Rudolph J. Stromp
1943-44	333	17 th	Raymond M. Neu				

Morristown Chapter

1959-60	0	-	William F. Gerth
1960-61	147	14 th	Stanley M. Babson, Jr.
1961-62	210	33 rd	Bron Zamrock, Jr.
1962-63	243	52 nd	Robert L. Shultis
1963-64	266	31 st	Francis J. Mejstrick
1964-65	289	42 nd	Fredrick W. Anderson
1965-66	328	17 th	Francis M. Mastomano
1966-67	362	49 th	James Varga
1967-68	386	65 th	Armand M. Kaplan
1968-69	396	19 th	Paul E. Shemp

Newark Chapter

1959-60	718	98 th	Frank Church
1960-61	670	93 rd	James A. Wilson
1961-62	648	6 th	Maurice E. Karosen
1962-63	706	24 th	Thomas F. Quinlan
1963-64	726	76 th	Frank L. Barrington, Jr.
1964-65	704	123 rd	James R. Youtz
1965-66	676	62 nd	George C. Robertson & Edward V. Mahon
1966-67	692	62 nd	Harold J. Meyers
1967-68	638	68 th	Ira M. Landis
1968-69	645	144 th	Marshall B. Sayre

Morristown Chapter

1969-70	453	29 th	Robert J. Arnese
1970-71	512	42 nd	Andrew J. Michaels
1971-72	521	57 th	George N. Sabo
1972-73	487	48 th	Charles J. Stancel
1973-74	486	88 th	Rudolph J. Thumes
1974-75	490	87 th	Charles A. Loeffler
1975-76	527	101 st	James T. Clinton
1976-77	581	128 th	Richard G. Light
1977-78	533	156 th	Bernard Stelmach
1978-79	554	89 th	Walter Schmeideskamp
1979-80	568	101 st	Thomas X. Hennigan
1980-81	588	76 th	J. David Gill
1981-82	608	72 nd	Angelo Rizzo
1982-83	600	124 th	Priscilla Florindi
1983-84	597	146 th	Joseph Ianco, Jr.
1984-85	527	34 th	Thomas X. Hennigan

Essex County Chapter

1969-70	599	119 th	Thomas G. Blanck
1970-71	558	102 nd	George S. Whitley, Jr.
1971-72	538	62 nd	Frederick L. Bittner
1972-73	498	159 th	Thor B. Anderson
1973-74	434	110 th	Robert W. Backes
1974-75	421	155 th	Robert C. Crefeld
1975-76	411	148 th	Juan Toscano, Jr.
1976-77	394	160 th	A. George Giorgino
1977-78	382	179 th	Arthur F. Hood
1978-79	350	161 st	Alfred M. Hauser
1979-80	318	177 th	Edward T. Delnero
1980-81	301	153 rd	Charles D. Sherman
1981-82	292	203 rd	Charles L. Keller
1982-83	282	33 rd	Laurence E. Karosen
1983-84	278	195 th	John M. Scott, Jr.
1984-85	259	200 th	Julian M. Freedman

Institute of Management Accountants Morris-Essex Chapter Competition History (cont.)

Yearly Membership and Chapter Competition Standings (cont.): (Year, Membership as of the beginning of the competition year (June 1st) Final Competition Standing, President)

Morris-Essex Chapter							
1985-86	771	179 th	James J. Murphy, Jr.	2003-04	340	63 rd	Paul Natalizio IV
1986-87	697	164 th	Dennis E. Neider	2004-05	301	39 th	Paul Natalizio IV
1987-88	674	138 th	Mary E. Johnston	2005-06	278	56 th	Paul Natalizio IV
1988-89	661	163 rd	John J. Crane	2006-07	251	27 th	Diann Pinkowski
1989-90	750	162 nd	Randy P. Nelson	2007-08	240	73 rd	William M. Barish
1990-91	645	9 th	Eileen Redfern	2008-09	217	42 nd	William M. Barish
1991-92	680	119 th	Joseph H. Kressman, Jr.	2009-10	215	50 th	Bill Grammaticas
1992-93	668	67 th	Frances M. Mastromano	2010-11	288	28 th	Donald M. Phillips
1993-94	653	39 th	James B. Eska	2011-12	260	40 th	William M. Barish & Paul Natalizio IV
1994-95	627	68 th	Richard C. Krenek	2012-13	257	35 th	Jacqueline Begraft & Candace Levine
1995-96	614	119 th	Richard T. Black	2013-14	257	21 st	Bill Grammaticas
1996-97	594	125 th	Richard F. Berk	2014-15	266	35 th	Alan Shandler
1997-98	537	22 nd	Charles S. Rall	2015-16	265	20 th	George Maniatty
1998-99	541	34 th	Anthony J. Berlangieri	2016-17	261		Peter C. Giammarinaro
1999-00	520	32 nd	Anthony J. Berlangieri				
2000-01	481	55 th	Edward A. Kaye				
2001-02	428	52 nd	Peter C. Giammarinaro				
2002-03	392	52 nd	Peter C. Giammarinaro				

Institute of Management Accountants Morris-Essex Chapter Membership Roster

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Mr. Joseph E. Iannini, CMA, CPA	jliannini@optonline.net	Cohnreznick LLP
Mr. Angelo V. Iannuzzi		
Paul J. Iapalucci		
Mr. William C. Johnson, CMA	bill.johnson@benjaminmoore.com	
John J. Julius	john.julius@bms.com	BRISTOL-MYERS SQUIBB COMPANY

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