

The Balance Sheet

SEPTEMBER 2011

Editor: Kathy Adams McIntosh, CMA

Date: September 20, 2011

Time: 5:00- 6:00 - Social
6:00-6:30 – Dinner
6:30-7:30 – Presentation (1 CPE)

Location: River's Bend
Address: 792 N. Riverview Drive
Phone: (920) 434-1383

Dinner Prices: \$20- Members or Guests,
\$10- Students

Dinner Choices: 8 oz. tenderloin, honey
pecan chicken or 8 oz. salmon
** includes side salad, baked potato
and dinner rolls*

Reservations: If you would like to
attend this month's meeting, please
email Tom LeMense at
tomlem54@hotmail.com by **Thursday,
September 15th** with your reservation
and dinner choice.

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Meet Our Speaker

— Mr. Bill Guc



Derivative Instruments: Complex Tools With Complex Rules

Bill Guc is Vice President & Treasurer for Integrys Energy Group. He oversees Integrys' financing and banking relationships, financial planning and analysis, risk management, and long- and short-term financing and investment strategies.

Prior to this role, Bill was Vice President/Controller for Integrys Energy Services. Bill joined WPS Energy Services in early 2005, shortly after the trading/marketing and power generation business units were combined under one management team. He has helped build the company's finance, credit and accounting organization which supports the organization's retail natural gas and electric businesses. He also worked extensively on the effort to divest and restructure Integrys Energy Services into a smaller, more focused, customer-centric business.

Prior to joining WPS Energy Services in 2005, Bill managed the accounting department for DTE Energy Trading, a non-regulated wholesale gas and electric trading company headquartered in Ann Arbor Michigan. His employment with DTE began in 2001 when DTE acquired MCN Energy where Bill was managing the accounting group for CoEnergy Trading, MCN's gas trading subsidiary.

Bill received a Bachelor of Science degree in Accounting from Wayne State University (Detroit, MI) in 1991 and a Masters of Business Information Technology from Walsh College (Troy, MI) in 2002. He is a certified public accountant and currently serves as President of the Green Bay Symphony Orchestra.

Bill is married with 3 children and enjoys hunting, running and biking and generally all outdoor activities.

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A Word from Your President

- *Mr. Greg Franda*



I am excited to begin my term as President of your Packerland Chapter of IMA. I look forward to seeing all of you this month. The Board of Directors has worked hard to put together a good selection of meetings for the year and I know there will be topics that everyone will find interesting and educational. Social hour will begin at 5:00 this year for you to socialize and network. Come to the September meeting and catch up on what happened over summer with your fellow members.

We start our year with Bill Guc from Integrys Energy Group discussing derivative instruments to help us understand the complex tools with complex rule on the subject. We will all have a better understanding of the subject after the meeting.

We are making some exciting changes to our program schedule this year. The meetings will remain the 3rd Tuesday of the month, but we are trying 2 new formats. We will have a lunch meeting in downtown Green Bay in place of our February evening meeting and we will have an appetizer meeting in May. In addition to 2 new formats, we will be trying 2 new venues this year, GreyStone Ale House in De Pere and Fox Harbor Pub & Grill in downtown Green Bay. I look forward to hearing what you think of these new locations.

We will also have a promotion this year to try and increase attendance. A Chapter member can bring a first time guest and the total cost will be \$30 for the 2 of you instead of \$20 each. Invite a friend and enjoy the activities.

We have made these changes to our schedule to try to improve your chapter experience. Our chapter is as good as our members make it, so help us have a successful year by attending several meetings starting with September. And we can always use volunteers on the Board, so increase your involvement with the chapter and help us get even better!

2011 Golf Outing Results

We had a great time out with friends out on the green.

Congratulations to all our winners!

*Neil Carriveau - \$50
Tom Decker - \$20 Gift Card
Dennis Dionne - \$20 Gift Card
Dale Ducat - \$20 Gift Card
Greg Franda - \$20 Gift Card
Jeff Hagen - \$50
Larry Hager - \$25
Jim Kiekhaefer - \$25
Hugh Kinnard - \$25
Dave Krutz - \$20 Gift Card
Tom Selk - \$25
Scott Trost - \$20 Gift Card
Al Walchinski - \$20 Gift Card*

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Professional Development Opportunities

Chapter Meetings

<u>Date</u>	<u>Time</u>	<u>Place</u>	<u>Topic</u>
9/20/11	6:00 PM	River's Bend	Derivatives
10/18/11	6:00 PM	Legend's in Howard	Leadership
11/15/11	6:00 PM	Rock Garden	Tax update
12/20/11	6:00 PM	GreyStone Ale House	Ethics
1/17/12	6:00 PM	River's Bend	WI Tax Atmosphere
2/21/12	12:00 PM	St. Brendan's	Young Professionals
3/20/12	6:00 PM	River's Bend	Community Development
4/17/12	6:00 PM	The Woods	Career search
5/15/12	6:00 PM	Fox Harbor	International business
7/17/12 (Golf outing)	11:00 AM	Hilly Haven	Have fun!

Additional Opportunities

2011 Lean Accounting Summit
September 15-16, 2011
Orlando, FL
www.leanaccountingsummit.com

An Evening With Jeffery C. Thomson,
President and CEO of the Global IMA
September 22-23, 2011
Milwaukee, WI
www.ima-gmc.org

Current Accounting Issues Conference
October 21, 2011
Rockford, IL
http://www.midamerica.imanet.org/2011_Fall_Conference_Flier.pdf



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Finish Strong

by Melissa Leonard, Gleim Chapter Coordinator

In sports, it is not uncommon to hear stories of how successful teams have rallied in the face of adversity behind a player, coach, or motto to stay motivated throughout the season. An example of this is the 2008 University of Florida football team that attributed much of its success to the motto "Finish Strong." Despite an unexpected, early-season setback, this motto permeated the lives of players and coaches on and off the field as they "Finished Strong," eventually winning the school's third national championship. The champions were motivated to;

- Finish Strong in the classroom.
- Finish Strong in the weight room.
- Finish Strong in practice.
- Finish Strong on every play.
- Finish Strong in every game. Most games are decided in the second half.
- Finish Strong every season. It is very difficult to win a championship if you lose late.

Candidates preparing for the CMA Exam can take this motto and apply it to their study preparations.

- Finish Strong on each practice test.
- Finish Strong each day you study. Set a goal and meet it.
- Finish Strong with your review. The final days are when you should undertake a cumulative review and focus on your weak areas.
- Finish Strong when answering each question on your exam. Put to use the test-taking skills you have learned.
- Finish Strong at the exam center. Be in control. You have done everything you can to be adequately prepared to PASS the exam. Remember, there are others who are not as well prepared as you.

This is something that carries over to each of our lives. Finish your day strong by ending it on a positive note. Finish what you have started, and not just for the sake of finishing it, but with the intention of doing the job well.

Gleim is committed to helping you accomplish your goal of passing the exam and becoming a CMA. Your Packerland IMA Chapter has partnered with Gleim to ensure your success on the CMA exam! As a Packerland Chapter member, you receive significant discounts on the Gleim CMA Review materials and Gleim CPE. Contact Melissa Leonard at 800.874.5346 ext. 131 or melissa.leonard@gleim.com to take advantage of the offer or if you have any questions.

**CONGRATULATIONS TO OUR
MAY PRIZE WINNERS!**

**DENNIS DIONNE – ATTENDANCE
JUDY HAEVERS - TRIVIA**

**Current Members:
To report changes to email
or mail address for our
chapter communications,
please contact**

**Greg Franda at
Franda_Greg_R@anchorcoup
ling.com**

**** To report changes to your
email or mail address for IMA
National communications,
please log into imanet.org and
change your profile directly. ****

Trivia

**What was the original
name of the IMA and
what year did it form?**

**Please bring your answer with
you to the September meeting
for your chance at the prize!**

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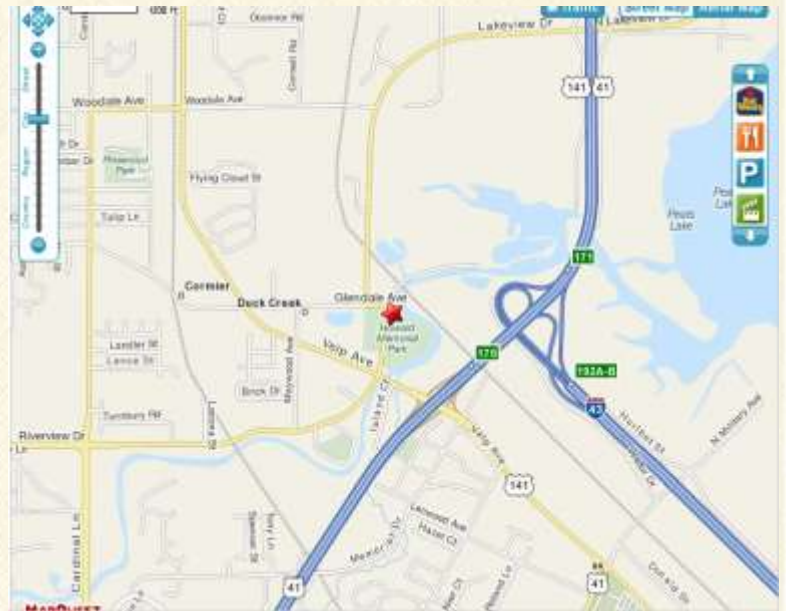
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Directions: From Highway 41 in Green Bay, take the Velp Avenue exit. Head west onto Velp. Turn right onto Riverview Dr/CR-J. 792 Riverview Dr is on the right.



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