



The Association of
Accountants and
Financial Professionals
in Business

Spotlight

EVANSVILLE
CHAPTER 076



Inside this issue:

| | |
|--|---|
| July Lunch Meeting Info | 1 |
| President's Message | 2 |
| 2017-18 Board of Directors & Aug Lunch Meeting | 3 |
| Save the Dates | 4 |
| Newsletter Deadlines & Other Chapter Info | 5 |
| USI Scholarship Donation Form | 6 |

Volume 17-07

Page 1

July Lunch Meeting Info

Tuesday, July 11th

11:45 a.m. - 1:00p.m.

Innovation Pointe - 2nd Floor

**Trudy Stock– President of Harding, Shymanski & Co.
“Different Strokes for Different Folks -Understanding the
different generations in the work place and leading in a
way to get your team moving in the same direction”**

Trudy Stock is President and CEO at Harding, Shymanski & Company, P.S.C. Trudy has experience with a variety of businesses and most recently was co-leader of the outsourcing department. Trudy has been with Harding, Shymanski & Company, P.S.C. since 1985 and assumed her current role in 2011. Trudy is a Magna Cum Laude graduate of the University of Southern Indiana with a Bachelor of Science degree in accounting. She is a member of the American Institute of Certified Public Accountants and the Indiana CPA Society. Trudy is involved in various organizations including: Chamber of Commerce of Southwestern Indiana, Junior Achievement of Southwest Indiana, Boys & Girls Club, USI Foundation, ANEW, St. Vincents's Health, Posey County Young Life, and United Way.

A variety of boxed lunches from Just Rennie's will be served on a first-come, first-served basis. Everyone who RSVPs will receive a lunch. RSVP at evansville.imanet.org/

WORRY-FREE PAYROLL PROCESSING
Beyond the Numbers

- Payroll without limits
- Data import/export features
- Powerful customized reporting
- Timely & accurate tax reporting

Call Matt Folz today
at 812.491.1391.



**HARDING, SHYMANSKI
& COMPANY, P.S.C.**
Certified Public Accountants
and Consultants
Evansville, IN • Louisville, KY
www.hsccpa.com



Window World
"Simply the Best for Less"



Joe Bush
Owner / President



4001 Vogel Road
Evansville, IN 47715
Evansville@WindowWorld.com

office: (812) 476-4600
cell: (812) 431-1460
fax: (812) 476-4602

www.WindowWorld.com

President's Message

Dear IMA Members:

Just to give some personal history of myself, I am from Evansville, born and raised. I went to Reitz High School, went on to USI to graduate in Spring 2010, and currently working at George Koch Sons, LLC. I was actively involved in USI organizations and that's how I found IMA. I joined IMA as a student member in 2008. I competed in the IMA Student Case Study Competition in 2009 and 2010, made the final 4 both years and our team won 1st place in 2010. I joined the IMA board in 2012 and have since held the positions of Secretary, VP of Membership, VP of Prof Education, Director of Newsletter, and Director of Meetings. I continue to be actively involved with USI as a Young Professional member of the Accounting Circle. I'm taking my experience with Case Studies by helping recruit high school students to USI and the accounting program through USI's High School Case Study Competition. During this time I also had my sweet daughter, Darcy, in 2015. I have a full and fulfilling life and I'm sure with support from our members, board of directors, and my husband, Scott Roberts, IMA Evansville Past President 15/16, we will have a successful year.



The IMA Evansville Chapter Board and I are pleased to serve you for the 2017-2018 year. Dumitra Pascu did a fantastic job as President for the previous year and we are very thankful for her leadership. Under her direction our chapter placed 17th in the Stevenson Division against heavy competition. The current Chapter Board is very excited for the upcoming year and we will continue to work at increasing the value in your IMA membership. We still have several open positions available on the board so if you are interested in taking on a leadership role, serving our members, and helping plan events for the upcoming year, please contact me. Several of these positions would be perfect for college students. This would be a great opportunity for them to network on a more personal level, gain experience on a board, and provide fresh ideas for our chapter. If you have an intern, please pass on this opportunity.

Our annual Turnover/Takeover Dinner was at Bru Burger on June 27th. We had a wonderful time thanking last year's board members, welcoming new board members, and looking back on the success of the previous year. A Special thank you to all of you that were able to attend! Our next luncheon will be held July 11th at Innovation Pointe with a presentation by Trudy Stock, President of Harding, Shymanski & Co, with the topic "Different Strokes for Different Folks". Please review the first page of our July newsletter for more information.

We also have our summer planning meetings scheduled for July 20th and August 17th at George Koch Sons/Koch Enterprises. Please mark your calendars for these upcoming events.

To all members, we welcome any ideas and/or feedback as we begin to plan for next year, so feel free to contact me!

Regards,
Kiersten Roberts
IMA Evansville Chapter 076 President
IMAPresident076@gmail.com

United *Leasing
& Finance*

Creative Financing Solutions

www.unitedevv.com • (800) 742-3928

 **Torian, Hofmann,
Dillow & Flittner**
INSURANCE • FINANCIAL

GLEN STOVER, CPCU, CIC
Auto Home Business Life Health

3000 E Division St
Evansville, IN 47711
glen@thdfins.com
www.thdfins.com

Tel. (812) 424-5503
Direct Tel. (812) 492-4147
Cell (812) 430-2960
Direct Fax (812) 492-4197

2017-18 Board of Directors

President ----- Kiersten Roberts

VP of Admin/President Elect ----- Mandy Chinn
 Treasurer----- Mary Pat Trainum
 Secretary ----- Kyle Hoeing
 Director of Meetings ----- Jesse Reising
 Director of Special Activities ----- **Open**
 Director of Employment ----- Curt Hahn

VP of Education-----Dennis Guthery
 Co Director of Edu. Meetings ----- Curt Hahn
 Co Director of Edu. Meetings ----- Brande Springer
 Educational meetings Jasper ----- Brenda Erny
 Director of Manuscripts ----- Mehmet K Kocakulah
 Director of Academic Relations ---- **Open**
 Director of CMA Programs ----- Aaron McCullough

VP of Communications- ----- **Open**
 Director of Newsletter----- Andy Peistrup
 Director of Community Service --- **Open**
 Director of Public Relations ----- Andy Peistrup
 Director of Program Booklet----- **Open**
 Director of Sponsors ----- Dave King
 Webmaster ----- Karen Blesch

VP of Membership & Marketing ----Dumitra Pascu
 Director Membership Acquisition - **Open**
 Director of Member Retention----- **Open**
 Director of Student Affairs for USI-Alyssa Moore

If you are interested in filling any of the open board positions or becoming more involved, please contact Kiersten Roberts at IMAPresident076@gmail.com

Aug Lunch Meeting — Tuesday, Aug 8th

11:45 am—1:00 pm

Sean Georges—Shoe Carnival-Senior Vice President of HR & In-House Council “Ethics”
Location: United Leasing, 3700 East Morgan Avenue, Evansville, IN 47711

Sean M. Georges, J.D., LL.M., currently serves as In-House Counsel, Assistant Secretary to the Board of Directors, and Senior Vice President of Human Resources for Shoe Carnival, Inc., a publicly-traded national retailer with over 415 stores in 35 states and Puerto Rico, headquartered in Evansville, Indiana. In 1983, Sean graduated with Distinction (English Honors) from the United States Naval Academy at Annapolis, Maryland, where he served as the Vice Chair of the Brigade Honor Committee. Sean accepted a Commission as a Marine Corps Officer, and while on Active Duty with the Marines, was one of ten Marine Officers selected to attend Law School under the Funded Law Education Program. He earned his Juris Doctorate degree from the University of Illinois College of Law in 1989, and in 1993 earned a Master of Laws degree from The Judge Advocate General’s School of the Army at the University of Virginia. During his 13 years on Active Duty as a Marine Corps Officer, Sean served in numerous positions of responsibility with units from North Carolina to Okinawa. As a Marine Judge Advocate, he served as Senior Trial Counsel and Senior Defense Counsel, Special Assistant United States Attorney, Deputy Staff Judge Advocate, and as Senior Judge Advocate for the 31st Marine Expeditionary Unit (Special Operations Capable). Prior to joining Shoe Carnival in 1999, Sean worked as a senior litigation associate at law firms in Evansville, Indiana, with a focus on business, employment, and labor law. He is admitted to practice in courts in Indiana, Illinois, and the U.S. Supreme Court. Sean is a frequent speaker on leadership, employment law, and human resources issues, and serves on numerous non-profit boards in the local community.



133 CROSS POINTE BLVD | 705 N. ST. JOSEPH AVE
 435 E. DIAMOND AVE | EVANSVILLE
 3811 HALEY DR | NEWBURGH

866-BANTERRA (226-8377)
 Banterra.com

MEMBER FDIC

From across town to across the country...
 Every day is moving day for us.
 Atlas
 go new places.
 800-638-9797
 www.atlasvanlines.com

Save the Dates!

RSVP for Evansville IMA Events at evansville.imanet.org/meetings-events

7/11/17 Lunch Meeting (11:45 am—1:00 pm)
Trudy Stock—President of Harding, Shymanski & Co
“Different Strokes for Different Folks -Understanding the different generations in the work place and leading in a way to get your team moving in the same direction”
Location: Innovation Pointe
2nd Floor (Just Rennie’s)

7/20/17 2017-2018 Planning Meeting (5:30 pm)
Location: Koch Enterprise

8/8/17 Lunch Meeting (11:45 am—1:00 pm)
Sean Georges—Shoe Carnival-Senior
Vice President of HR &
In-House Council “Ethics”
Location: **United Leasing**

8/17/17 2017-2018 Planning Meeting (5:30 pm)
Location: Koch Enterprise

9/12/17 Lunch Meeting (11:45 am—1:00 pm)
Susan Hardwick—Vectren
Executive Vice President &
Chief Financial Officer
Location: Innovation Pointe
2nd Floor (Just Rennie’s)

10/6&7/17 Lincoln Trail Council meeting in Evansville

10/10/17 Lunch Meeting (11:45 am—1:00 pm)
BKD
Location: Innovation Pointe
2nd Floor (Just Rennie’s)

TBD All Day Saturday and Third Thursday CPE
Events Dates Will Be Determined at the
Planning Meetings.



Looking for a way to grow your business?

Know a business owner that would like to grow their business? Advertise in the IMA newsletter. Great rates and reach over 250 professionals and students. Contact Dave King at davkking@aol.com for details.



Newsletter Deadlines

IMA *Spotlight* is published on a monthly basis by the Evansville Chapter of the IMA. In an effort to keep the newsletter relevant, useful, and informative, feedback on the contents for the newsletter is welcome. Members desiring to contribute transcripts, bulletins, and other items of interest to the *Spotlight* should contact Andy Peistrup at ampeistrup@yahoo.com.

| | |
|---------|-----------|
| July 20 | Aug Issue |
| Aug 20 | Sep Issue |
| Sep 20 | Oct Issue |
| Oct 20 | Nov Issue |
| Nov 20 | Dec Issue |

ATTENTION:
There is no such thing as a free lunch or dinner.
 Our Evansville IMA must pay for meals based on all reservations whether you attend or not. We would appreciate your cooperation in honoring your reservations and paying for your meal. If you were unable to attend, please remit payment to: IMA Evansville, P.O. Box 184, Evansville, IN 47702.

IS YOUR IMA PROFILE UP TO DATE?

If you have changed jobs or had other status changes please visit the IMA Global website to update your profile. www.imanet.org

YOU ARE THE ONLY ONE WHO CAN MAKE CHANGES TO YOUR PROFILE.



Thank You!

TOWN & COUNTRY
 SUPER Ford STORE
 THE TRISTATE'S TOP VOLUME FORD DEALER
SUPERFORDSTORE.COM 812-471-3673

HILLIARD LYONS
 THE HOLLANDER GROUP

Financial Consultants
 Ronald G. Hollander, Senior Vice President
 Tricia M. Hollander Henning, CFP®, CIMA®, CPWA®, Senior Vice President
 Teri M. Hollander Albin, CFP®, CIMA®, CPWA®, Senior Vice President
 110 Main St., Evansville, IN 47708
 Tel: (812) 426-1481 Fax: (812) 428-8697 Toll-Free: (888) 426-1481
 Email: hollandergroup@hilliard.com | www.thehollandergroup.com

Securities offered by J.J.B. Hilliard, W.L. Lyons, LLC. Member NYSE, FINRA & SIPC

DEBT COLLECTION
 WE USE THE POWER OF THE COURTS TO COLLECT

KDDK
 KAHN, DEES, DONOVAN & KAHN, LLP
 Attorneys & Counselors at Law

OUR COLLECTION TEAM OFFERS:
 Wage Garnishments • Bank Account Garnishments • Real Estate Liens

812-423-3183 • 5th & Main, Evansville, IN • www.kddk.com

ALTSTADT'S

- SALES
- SERVICE
- LEASING

Amazing Service. Lasting Solutions.
 Tailored to You.

812-425-3393
 1550 BAKER AVE • EVANSVILLE, IN 47710
SHARP COPIERS



IMA Outstanding Junior Scholarship Endowment

Name _____
 Class of _____
 Address _____
 City _____ State _____ Zip _____
 Telephone _____
 Email _____

- Yes! I want to support the IMA Outstanding Junior Scholarship Endowment with a charitable gift:
- \$ _____ Amount enclosed or
 \$ _____ Amount pledged
 Please remind me in _____ (month)

Payment Method

- Check enclosed (made payable to USI Foundation)
 Yes, enclosed is my matching gift form www.matchinggifts.com/usi.
 Credit Card Information
 Visa MasterCard Discover American Express
 Personal Credit Card Company Credit Card

Cardholder Name _____
 Card Number _____
 Expiration Date ____/____
 Signature _____

- Electronic checking, savings, and credit card deductions are available at www.usi.edu/onlinegiving.

Please make your tax-deductible check payable to:
 USI Foundation
 8600 University Boulevard
 Evansville, IN 47712

Increase Your Giving Power

Indiana Tax Credit

Indiana residents qualify for the Indiana College Credit when they make charitable gifts to colleges and universities located in the State of Indiana, including the USI Foundation. Individuals who make charitable gifts of up to \$400 on a joint return, or \$200 on a single return, are allowed a *credit* against their Indiana state adjusted gross income tax liability. File Schedule CC-40 with your Indiana tax return to receive up to \$200 credit on a jointly filed return or up to \$100 credit on a single return. The amount of a corporation's credit is equal to 50 percent of the total amount given during the tax year. However, the credit may not exceed the lesser of a) 10 percent of the corporation's adjusted gross income tax liability, or b) the amount of \$1000.

Federal Tax Deduction

Every dollar of your charitable gift to the USI Foundation qualifies for a deduction as a contribution on your federal income tax return. Individuals must itemize deductions and the deduction is subject to the general limitation of 50 percent (30 percent for gifts of appreciated capital gain property) of adjusted gross income. A corporation may generally deduct charitable contributions of up to 10 percent of its taxable income.

Matching Gift

Matching Gifts double your dollars. Over 1,000 U.S. corporations have established programs to match gifts made to colleges and universities by their employees, and in some cases a retiree or the spouse of an employee. Check with your company's Human Resources Department for procedures to follow. Take this opportunity to increase your gift to USI. You will receive full credit for a matching gift.

Gifts of Stock

Transferring gifts of stock directly to the USI Foundation may enable you to avoid capital gains tax. Please contact your own advisor.

Transferring Gifts of Stock

Either: Arrange for an electronic stock transfer by notifying your broker or agent to contact the Foundation Accounting office at 812/465-1081 for up-to-date transfer instructions.

Or: Mail your stock certificate without endorsing it and mail in a separate envelope a signed stock power authorizing gift of stock to USI Foundation. Mail to: USI Foundation, 8600 University Blvd, Evansville, IN 47712.

Or: Deliver your endorsed stock certificate to Old National Trust, Old National Bank in Evansville.

Will/Bequest/Trust

_____ I have provided for the University of Southern Indiana in a will or other arrangement.

_____ I would like information about how to make a planned gift.

The USI Foundation is a 501(c)(3) not-for-profit corporation. It issues a receipt for every gift.

The USI Foundation's fiscal year is July 1 – June 30