

September  
18-19, 2019



# 2019 HEARTLAND IMA CONFERENCE AGENDA

Time				Wednesday, September 18				Time				Thursday, September 19			
7 AM	To	9 AM	Registration Open	7 AM	To	9 AM	Registration Open	7 AM	To	9 AM	Registration Open	7 AM	To	9 AM	Registration Open
7:15 AM	To	8 AM	Breakfast	7:15 AM	To	8 AM	Breakfast	7:15 AM	To	8 AM	Breakfast	7:15 AM	To	8 AM	Breakfast
8 AM	To	8:10 AM	Welcome and Opening	8 AM	To	8:10 AM	Welcome and Opening	8 AM	To	8:10 AM	Welcome and Opening	8 AM	To	8:10 AM	Welcome and Opening
8:10 AM	To	9 AM	Leadership Building Blocks	8:10 AM	To	9 AM	Leadership Building Blocks	8:10 AM	To	9 AM	What's New In Excel	8:10 AM	To	9 AM	What's New In Excel
9 AM	To	9:15 AM	Break	9 AM	To	9:15 AM	Break	9 AM	To	9:15 AM	Break	9 AM	To	9:15 AM	Break
9:15 AM	To	10:30 AM	2019 Economy and Look Ahead to 2020	9:15 AM	To	10:30 AM	Breakout C	9:15 AM	To	10:05 AM	Processing Big Data in Excel	9:15 AM	To	10:05 AM	Processing Big Data in Excel
10:30 AM	To	10:45 AM	Break	10:30 AM	To	10:45 AM	Break	9:15 AM	To	10:05 AM	Creating High Performance Teams	9:15 AM	To	10:05 AM	Creating High Performance Teams
10:45 AM	To	Noon	Cybersecurity	10:45 AM	To	Noon	Cybersecurity	9:15 AM	To	10:05 AM	ERM's Migration into the Auditing World	9:15 AM	To	10:05 AM	ERM's Migration into the Auditing World
Noon	To	1:10 PM	Lunch	Noon	To	1:10 PM	Lunch	10:05 AM	To	10:20 AM	Break	10:05 AM	To	10:20 AM	Break
Breakout A				Breakout D				Breakout D				Breakout D			
1:10 PM	To	2:25 PM	Balanced Scorecard for Compensation Planning	1:10 PM	To	2:25 PM	Individual Tax Update	10:20 AM	To	Noon	Crossing the Ethical Boundary	10:20 AM	To	Noon	Crossing the Ethical Boundary
1:10 PM	To	2:25 PM	Emotional Intelligence	1:10 PM	To	2:25 PM	Emotional Intelligence	Noon	To	1:10 PM	Lunch	Noon	To	1:10 PM	Lunch
2:25 PM	To	2:40 PM	Break	2:25 PM	To	2:40 PM	Break	1:10 PM	To	2:25 PM	Put Your Best Voice Forward	1:10 PM	To	2:25 PM	Put Your Best Voice Forward
Breakout B				Breakout D				Breakout D				Breakout D			
2:40 PM	To	3:55 PM	Corporate Tax Update	2:40 PM	To	3:55 PM	Six Sigma	2:40 PM	To	3:55 PM	Excel Formulas Can Now Spill	2:40 PM	To	3:55 PM	Excel Formulas Can Now Spill
2:40 PM	To	3:55 PM	Six Sigma	2:40 PM	To	3:55 PM	Marijuana in Missouri: Effects on Employer Drug Testing	2:40 PM	To	3:55 PM	Next Step Blockchain: Regulations & Trends CPA's Need to Know	2:40 PM	To	3:55 PM	Next Step Blockchain: Regulations & Trends CPA's Need to Know
2:40 PM	To	3:55 PM	Marijuana in Missouri: Effects on Employer Drug Testing	2:40 PM	To	3:55 PM	Break	2:40 PM	To	3:55 PM	Asset Protection - Ways to Minimize Liability Exposure Through Estate Planning	2:40 PM	To	3:55 PM	Asset Protection - Ways to Minimize Liability Exposure Through Estate Planning
3:55 PM	To	4:10 PM	Break	3:55 PM	To	4:10 PM	Break	3:55 PM	To	4:10 PM	Break	3:55 PM	To	4:10 PM	Break
4:10 PM	To	5 PM	Multipliers: How Great Leaders Make Their Organizations Better	4:10 PM	To	5 PM	Multipliers: How Great Leaders Make Their Organizations Better	4:10 PM	To	5 PM	Great Game of Business	4:10 PM	To	5 PM	Great Game of Business

The Heartland Council of the Institute of Management Accountants is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit.

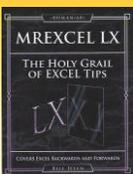
Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.nasbaregistry.org](http://www.nasbaregistry.org)

Attendees will receive up to 16 Hours of CPE, Breakfast, Lunch and Refreshments daily and a new book by Mr. Excell!

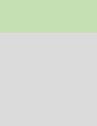
University Plaza Convention Center – 333 John Q. Hammons Parkway, Springfield, Missouri

Early Bird: \$390 (before August 15<sup>th</sup>) Regular Registration: \$410

First Timers get a \$25 discount!



	Shannon McKain	Leadership Building Blocks	1 CPE	<ul style="list-style-type: none"> <li>Discover the four pillars of leadership and how they can make or break any organization.</li> <li>Learn about situational leadership.</li> </ul>
	Chris Kuehl	2019 Economy and a Look Ahead to 2020	1.5 CPE	<ul style="list-style-type: none"> <li>Understand the current issues affecting the economy.</li> <li>Understand the factors that will affect the economy going forward into 2020.</li> </ul>
	Shannon McMurtrey	Cybersecurity	1.5 CPE	<ul style="list-style-type: none"> <li>Objectives and key results that you can put into place to help you stay safe online.</li> </ul>
	Sean Kouplen	Multipliers: How Great Leaders Make Their Organizations Better	1 CPE	<ul style="list-style-type: none"> <li>Learn strategies for improving employee engagement and corporate culture scores.</li> <li>Learn strategies for developing a high-performance culture.</li> <li>Learn why certain leaders grow their employees while others don't (and look for those leaders in the future.)</li> <li>Re-evaluate ourselves as leaders to determine if we are multipliers or diminishers.</li> </ul>
	Bill Jelen	What's New in Excel	1 CPE	<ul style="list-style-type: none"> <li>Build formulas to pull data from Rich Data types for stock prices or geography.</li> <li>Use artificial intelligence in Excel to analyze data sets</li> <li>Use the new Sort function to sort data.</li> <li>Collect and analyze survey data in Excel.</li> </ul>
	Angela Morelock	Crossing the Ethical Boundary	2 CPE	<ul style="list-style-type: none"> <li>Discuss examples of CPA's and other individuals that have crossed the ethical boundary.</li> <li>Assess a situation for potential fraud.</li> <li>Describe concepts of rationalization and normalization in fraud cases.</li> <li>Evaluate and resolve ethical dilemmas.</li> </ul>
	Rena Cook	Put Your Best Voice Forward	1.5 CPE	<ul style="list-style-type: none"> <li>Strategies and techniques that will have you speaking more confidently, breathing more deeply and standing a little straighter.</li> <li>Learn the things you can do today and each time you walk into an interview, meeting or presentation that can make you sound and look more professional.</li> </ul>
	Steve Baker	Great Game of Business	1 CPE	<ul style="list-style-type: none"> <li>Discover the origins and fundamentals of open-book management.</li> <li>Take away knowledge of how to begin introducing it to their organizations.</li> <li>Possess a key exercise to influence others with their knowledge.</li> </ul>

	Adrienne McCoy	Balanced Scorecard for Compensation Planning	1.5 CPE	<ul style="list-style-type: none"> <li>What is the Balanced Scorecard approach to organizational management?</li> <li>What is the purpose of using Balanced Scorecards?</li> <li>How the Balanced Scorecard works.</li> <li>How does the Balanced Scorecard effect company culture?</li> </ul>
	Erica Smith	Individual Tax Update	1.5 CPE	<ul style="list-style-type: none"> <li>Discuss the most important individual Tax Cuts and Jobs Act 2018 changes.</li> <li>Understand how the changes will affect individuals &amp; new guidance received since enactment.</li> <li>Discuss tax challenges facing individuals.</li> </ul>
	Shannon McKain	Emotional Intelligence	1.5 CPE	<ul style="list-style-type: none"> <li>Get the tools to identify, assess and control your own personality.</li> <li>Learn to work with the variety of personalities in your workplace.</li> <li>Increase your social and emotional I.Q.</li> </ul>
	Derek Smith	Corporate Tax Update	1.5 CPE	<ul style="list-style-type: none"> <li>Explain what insights have been gained into several provisions of the TCJA.</li> <li>Understand how the QBI deduction limitations work.</li> <li>Discuss innovative tax-planning concepts.</li> <li>Understand the guidance on qualified opportunity zones and identify planning opportunities.</li> </ul>
	Ginger White	Six Sigma	1.5 CPE	<ul style="list-style-type: none"> <li>Learn the definition and application of Six Sigma.</li> <li>Complete an inspection exercise that illustrates the impact of variation on a process or product outcome.</li> <li>Learn about the Cummins Six Sigma Management System and Success of the Six Sigma program.</li> <li>Review an IRS Interest Assessment Six Sigma project and share positive business impact.</li> </ul>
	Rick Temple	Marijuana in Missouri: Effects on Employer Drug Testing	1.5 CPE	<ul style="list-style-type: none"> <li>This workshop will explore the latest information available to employers in Missouri on the effects of the new marijuana law on their drug testing programs.</li> <li>Update attendees so as to be able to answer questions of employer clients.</li> </ul>
	Alia Stowers	Creating High Performance Teams	1 CPE	<ul style="list-style-type: none"> <li>Learn how your team can work through the Five Dysfunctions of a Team.</li> <li>Transform your team into a high performing team.</li> <li>Use interactive discussion, conflict management and team building activities to create high performance teams.</li> </ul>
	Heath Silvey	ERM's Migration into the Auditing World	1 CPE	<ul style="list-style-type: none"> <li>Using Enterprise Risk Management (ERM) and Auditing hand in hand, gain an understanding of risk identification, assessment, and mitigation.</li> <li>Learn how Risk Management and Auditing is central and becoming a key part of a well-rounded accounting education.</li> </ul>
	Bill Jelen	Processing Big Data in Excel	1 CPE	<ul style="list-style-type: none"> <li>Use Power Query to filter out some records so you can load large data into Excel.</li> <li>Use the Merge feature in Power Query to perform a VLOOKUP during import.</li> <li>Uwe the Group feature in Power Query to summarize large data sets before loading.</li> <li>Use the Load to Data Model feature in Excel to process millions of records.</li> <li>Create pivot tables based on the data model.</li> </ul>
	Bill Jelen	Excel Formulas Can Now Spill	1.5 CPE	<ul style="list-style-type: none"> <li>Use SORT and SORTBY to sort a data set using a formula.</li> <li>Use FILTER and UNIQUE to extract a portion of data using a formula.</li> <li>See how RANDARRAY can perform Monty Carlo Analysis.</li> <li>Use SEQUENCE inside of other functions to make them into array formulas.</li> <li>How to refer to SPILL ranges using the new Spiller nomenclature in Excel.</li> </ul>
	Sean Stien Smith	Next Step Blockchain: Regulations & Trends CPA's Need to Know	1.5 CPE	<ul style="list-style-type: none"> <li>Articulate how blockchain applications are driving change and innovation in accounting firms and other organizations.</li> <li>Explain how changing regulations, both at the state and federal level, are shifting the accounting conversation for practitioners and organizations.</li> <li>Analyze and examine how, as blockchain and cryptocurrency tools become increasingly mainstream emerging issues such as cybersecurity taxation and data integrity will also evolve and change.</li> </ul>
	Emily Kembell	Asset Protection – Ways to Minimize Liability Exposure Through Estate Planning	1.5 CPE	<ul style="list-style-type: none"> <li>Learn about how proper titling can minimize liability exposure.</li> <li>Learn about various asset protection techniques using trust agreements.</li> </ul>

# CORPORATE SPONSORSHIP OPPORTUNITIES

Do you want to save money on every ticket purchased? Become a corporate sponsor and watch your savings grow with each registration! In addition to per ticket savings, your company will be entitled to the benefits listed below. *(Based on your sponsorship level)*

Registration Form

Co. Name \_\_\_\_\_  
 Co. Address \_\_\_\_\_  
 City/State/Zip \_\_\_\_\_  
 Contact Name \_\_\_\_\_  
 Contact Phone \_\_\_\_\_  
 Contact Email \_\_\_\_\_

Sponsor Levels		Price Per Ticket	# of Tickets	Minimum Investment Required	Savings off Regular Ticket Price	Exhibit Booth?
Sponsors Mark one	Platinum	\$335.00	21	\$7,035.00	\$1,575.00	Y N
	Gold	\$355.00	10	\$3,550.00	\$550.00	Y N
	Silver	\$370.00	5	\$1,850.00	\$200.00	Y N
	Bronze	\$380.00	2	\$760.00	\$60.00	
	Exhibitor			\$400.00		
Individual	Early Bird	\$390.00	Regular	\$410.00	First Time Discount	Y N

Benefits	As a corporate sponsor, you will be able to purchase discount tickets to the conference, your company name and logo will appear in the participant packets and much more! (see below)
Bronze	2 discounted tickets to the full conference (\$60 Savings) Company name/logo on website
Silver	5 discounted tickets to the full conference (\$200 Savings) Company name/logo on website Opportunity to put promotional materials in participant packets Free Exhibit Booth (if desired)
Gold	10 discounted tickets to the full conference (\$550 Savings) Company name/logo on website Opportunity to put promotional materials in participant packets Free Exhibit booth (if desired)
Platinum	21 discounted tickets to the full conference (\$1575 Savings) Company name/logo on website Opportunity to put promotional materials in participant packets Free Exhibit booth (if desired) Specific event sponsorship with signage highlighting your company (if desired)

2018 Sponsors

## REGISTRATION AND PAYMENT OPTIONS:

To REGISTER:

**CREDIT CARD:** Go to [associations.missouristate.edu/IMA](http://associations.missouristate.edu/IMA) scroll to the bottom and click on register now or call Belinda Pearson at 417-836-6866.

**CHECK:** You may either use the registration form on this brochure or go to [associations.missouristate.edu/IMA](http://associations.missouristate.edu/IMA), scroll to the bottom and click on the download registration form link, print and submit with your check. Checks should be made payable to MSU and mailed to MSU Outreach, Attn: Belinda Pearson, 901 S. National, Springfield, MO 65897.

REGISTRATION DEADLINE: 9/16/2019

The conference program for 2019 requires no prerequisites or advanced preparation and is program level Basic. Field of Study for each session can be found at [associations.missouristate.edu/IMA](http://associations.missouristate.edu/IMA).

**CANCELLATIONS, REFUNDS & SUBSTITUTIONS:** Cancellations made less than five working days prior to the conference start date are subject to a \$50.00 cancellation fee. Refunds will not be granted after the conference has begun. Substitutions may be made prior to the conference start date.

If you have any questions or any technical difficulties, contact Belinda Pearson at 417-836-6866 or [bpearson@missouristate.edu](mailto:bpearson@missouristate.edu)