

## *PRESIDENT'S MESSAGE*

What an awesome way to kick off the second half of our 2007 – 2008 chapter year. Although I was away on business, the feedback I received from everyone was that both the Pre-Dinner and the Dinner topics were very engaging and informative.

For those who attended the January meeting, you were introduced to our 2008 – 2009 IMA Atlanta Chapter President Darla Worsham, and Secretary Tammy McLain. Both have been very active over the past years on the board and I'm confident that the renewed focus of driving chapter membership, and creating valuable programs for our members will continue as we transition to a new board. During our February meeting, we will be announcing the rest of the board....so please make a point to attend so that you can become familiar with the individuals who will be at the helm of making this chapter the best it can be!

For our members who would like to take an active role in designing your IMA Chapter, we are still seeking Board Members to support the chapter in an "At Large" position. This is an excellent way to support the various departments of the Atlanta Chapter without giving up too much of your time. The return on investment is tremendous for both the At Large board member; as well as, the Atlanta Chapter.

Last, but definitely not least, the Gulf South Council of the IMA will be conducting its' Winter program on February 15<sup>th</sup> & 16<sup>th</sup> in Birmingham, AL (see insert later in newsletter for more details on the educational session). All IMA members are encouraged to attend the general council meeting on the 16<sup>th</sup> @ 9:00am if at all possible (cost is free). This is a great way to experience the IMA from a larger standpoint than just right here in Atlanta; plus, it is a great way to meet other IMA members who share a similar liking for the organization.

Please be sure to mark your calendar for the following IMA Atlanta Chapter events:

- February 19<sup>th</sup> Panel Discussion on Mergers & Acquisitions.
- March 18<sup>th</sup> (Student Night) Margaret DeFrancisco COO Georgia Lottery Corp.
- April 22<sup>nd</sup> State Senator Chip Rogers (Immigrations Issues)
- May (4 hour Ethics Program)

Warm regards,  
Daniel Guelzo, CTS, CPC  
Chapter President

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**February Dinner Meeting – Tuesday, February 19, 2008**

Crowne Plaza @ I-285 & Powers Ferry Rd  
\$35 members, \$40 Non-members, \$20 For All Students and Professors

5:00pm to 6:00pm, Pre-Dinner Technical Meeting  
6:00pm to 6:45pm, Networking/Social Time  
6:46pm to 8:00pm, Dinner & Presentation

*Pre-Dinner Technical Meeting*

**“Managing Interest Rate Risk in 2008” - Presented by  
Jonathan T. Hyman of Wachovia Bank, N.A.**



*Dinner Meeting Presentation*

**A Panel Discussion on “Trends in Mergers & Acquisitions:  
Selling the Closely Held Business” – Panel moderator to be  
Robert Dow, Partner with the law firm of Arnall Golden  
Gregory, LLP.**

Please join the IMA in thanking **Wachovia Bank, N.A.** for their sponsorship of this dinner – you can visit their website @ [www.wachovia.com](http://www.wachovia.com)



Please make your reservations by calling 404-525-2774 or by website at [www.imaatlanta.org](http://www.imaatlanta.org)

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**Jonathan T. Hyman – Pre Dinner Speaker**

**Global Rates Derivative Marketing**

Mr. Hyman joined Wachovia in May 2005 as an Analyst in the Fixed Income Derivatives Marketing Group. Over the past two and a half years, he has covered Wachovia's various markets along the East Coast. Currently, Mr. Hyman works on a team responsible for structuring interest rate risk management strategies for clients throughout the Southeast United States.

Mr. Hyman graduated in 2005 with a BA in Political Science and German from Wake Forest University in North Carolina.

**Ed Fisher – Dinner Panelist**

**Managing Partner**

Since 2003, Ed has been managing partner of SouthPointe Ventures, LLC, a small-cap private equity buy-out fund headquartered in Atlanta. SouthPointe makes control investments in basic industry businesses headquartered throughout the Southeast with revenues of \$5-\$30 million and EBITDA from \$1- \$3 million. ([www.southpointeventures.com](http://www.southpointeventures.com))

Prior to SouthPointe, Ed was a partner at merchant banking firm EGL Holdings, Inc., and before joining EGL, Ed was a portfolio partner for Prometheus Partners, an Atlanta-based leveraged buyout firm with transaction focus on recurring revenue service businesses up to \$50MM in transaction size.

Prior to his career in private equity, Ed was CFO for the 3<sup>rd</sup>-largest Wendy's operation in the U.S., and VP of sales for a family-owned equipment distribution business. Ed started his career in commercial lending in Atlanta with C&S Bank (now Bank of America) and First Union (now Wachovia).

Ed graduated in 1983 with a BBA degree in finance from the University of Notre Dame.

**Kurt Putkonen – Dinner Panelist**

**Senior Vice-President**

Kurt Putkonen joined PNC Business Credit in 1998 and opened the Atlanta sales office. In November, 1999 he was appointed the Southeast Region Manager responsible for Business Development in the Southeast for PNC Business Credit. Prior to joining PNC Business Credit, Putkonen was with SunTrust Bank, Central Florida. He began his career with Marine Midland Business Credit where he served for 16

years in various capacities, most recently as the Regional manager of the Kansas City and Atlanta asset based lending offices.

Putkonen is a member of the Commercial Finance Association, Atlanta Venture Forum, Association for Corporate Growth and Turnaround Management Association.

Putkonen, originally from the Chicago area, is a graduate of Northern Illinois University with a Bachelor of Science in Finance. He also attended DePaul University in the Masters of Science in Accounting program.

### **Don H. Bravaldo, III – Dinner Panelist** Principal

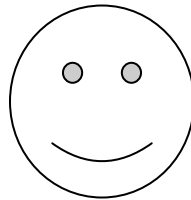
Before joining Walden in August 2000, Don served as the business development manager for Hanger Orthopedic Group, Inc., a large, publicly traded, consolidator of small to midsize closely held and family run orthopedic and prosthetic service businesses. Don was responsible for Hanger's vast mergers and acquisitions activity through out North America. At Hanger, Don conducted and administered all phases of the mergers and acquisitions process including identifying potential acquisition targets, initiating contact with potential sellers, performing business valuations, extending and negotiating offers, conducting due diligence investigations, and managing the formal closing process with attorneys, accountants and sellers.



Don Bravaldo is also a former auditor with Bennett Thrasher & Co., P.C. and Arthur Andersen LLP. Former responsibilities included managing, performing and coordinating financial reporting engagements and providing business-consulting services to clients located throughout the southeast and Metro Atlanta Markets. Don gained extensive experience working with a variety of closely held and family businesses in the construction, service, manufacturing, distribution, real estate, and transportation industries.

With a diverse M & A client base that changes depending on M & A trends and client needs, Don specializes in focusing on sell-side merger and acquisition advisory engagements throughout the Southeastern U.S. for privately held and closely held businesses in the \$5 Million to \$150 Million revenue range. Clients have included business owners in all major industry categories encompassing manufacturing, distribution, transportation, construction, healthcare, and service industries.

Don is a member of the Georgia Society of Certified Public Accountants and the American Institute of Certified Public Accountants. He graduated Cum Laude with a BS in Accounting from Auburn University. Don is a member of several national and Atlanta area professional and civic organizations. Don is active in his church and enjoys golf, fishing and the outdoors.



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**Lunch Meeting – Thursday, February 28, 2008**  
**\*NOTE THAT THIS MEETING IS AT THE LAW OFFICES OF ARNALL GOLDEN GREGORY, LLP\***

171 17<sup>TH</sup> Street, Suite #2100  
Atlanta, GA 30363  
(404) 873-8500

\$15 members, \$20 Non-members  
11:45am to 1:00pm

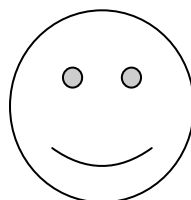
“Topic & Speaker - “An Update on Identity Theft” – Speaker TBD!

Please make your reservations by calling 404-525-2774 or by website at [www.imaatlanta.org](http://www.imaatlanta.org)

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Please join the IMA in thanking **Arnall Golden Gregory, LLP** for their continued support of the IMA. You can learn more by visiting their website @ [www.arnallgoldengregory.com](http://www.arnallgoldengregory.com).

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## **Workplace Dos' and Dons', Ethics, Disaster Recovery and Record Retention**

### **Speakers:**

**Bert M. Guy, Esq. and Blake A. Madison, Esq. – Tanner & Guin, LLC,  
Donny Hayes and Chris Parton – Blue Cross and Blue Shield of AL, and  
Trudy M. Phillips – File Management, LLC**

**Friday, February 15, 2008**

Registration

8:00 a.m. - 8:30 a.m.

Seminar with breaks

8 hrs CPE

8:30 a.m. - 4:30 p.m.

Catered Lunch

12:00 p.m. - 12:45 p.m.

### **Location:**

**Hilton Garden Inn**

520 Wildwood North Circle

Birmingham, AL 35209

(205) 314-0274

Room Rate: \$119.00/night

### **Reservations:**

**1-800-HILTONS or on-line at [Hilton.com](http://Hilton.com) – Code IMA**

**Deadline: 01/15/2008**

Mapquest.com directions can be found using address above.

*Open to all members – NO Charge!*

Sat., Feb. 16, 10:00 a.m.

GulfSouth Council Meeting

## REGISTRATION FORM

Please photocopy this form if needed.

\_\_\_\_\_ CMA CFM CPA  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Company

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_ Phone \_\_\_\_\_ E-mail

\_\_\_\_\_  
IMA Chapter

Non-Member (Please send membership info)

**Pricing Information:**

	Received by 2-01-08	Received after 2-01-08
Member	\$165	\$190
Non-Member	\$195	\$215
Students	\$85	\$110

I have enclosed a check payable to **IMA Gulf South Council** for \$\_\_\_\_\_ to cover the cost of registration. Payment must be received by 2/01/08 to guarantee early registration price. All fees must be received by 2/08/08 or arrangements made to pay at sign-in.

**ABOUT THE SPEAKERS:**

**Bert M. Guy** – Managing Member of Tanner & Guin, LLC. His practice consists of experience in the areas of workplace issues and how they impact the strategic growth and management of companies and organizations. He has experience in serving as a strategic advisor to clients in the areas of trademark and copyright issues, antitrust and business dispute issues, and has assisted clients in libel, slander and defamation cases. [www.tannerguin.com](http://www.tannerguin.com).

**Blake A. Madison** - Member of Tanner & Guin, LLC. He practices in the areas of business, corporate and commercial law, with an emphasis on state and local taxes. He has experience handling complex contract negotiations. Mr. Madison has additional experience in the areas of health care law, issues related to the privacy and security of information, and tax incentive issues. [www.tannerguin.com](http://www.tannerguin.com).

**Chris Parton** – Employed at Blue Cross and Blue Shield of Alabama in 1997. He is currently the Department Manager of Information Security and Business Recovery Planning and has been an active participant in BCBSAL's disaster planning activities since 2002 and has led their pandemic planning efforts since they began in 2005. He has a BS Degree in Nursing and holds a Master's degree in Health Informatics. He also received the Certified Information Systems Security Professional (CISSP) designation in 2004. Prior to BCBSAL, Chris began his career in the Department of Pediatric Cardiology at UAB Hospital in Birmingham.

**Donny Hayes** – Employed at Blue Cross and Blue Shield of Alabama in 1997. For the last five years he has worked in Information Security where he is currently the Information Security Manager. He has been overseeing the BCBSAL Continuity Program for the last 8 months. He received the Certified Information Systems Security Professional (CISSP) designation in 2004.

**Trudy M. Phillips** – President of File Management, LLC. She founded a document imaging service company in 1984 in Birmingham and sold it in 1988. In 1996 she acquired a near bankrupt commercial records storage center and sold it to Iron Mountain in 1999. Since 1988, she has been consulting with Fortune 500 companies and small business to find solutions for their information management needs. She assists them in organizing their information, whether it is paper documents or electronic files. [www.filemanagement.com](http://www.filemanagement.com).

**ABOUT THIS SEMINAR**

The seminar will be divided into four sessions. Attendees will receive a brief overview on each topic. All sessions must be attended by registrant for CPE credit.

Bert Guy will provide information regarding worker/employer related situations. His experience in handling issues for companies with problems in this area will be both informative and in some cases entertaining. Bert will cite cases that he has been involved in and show how they relate to workplace laws.

Blake Madison will speak on areas of ethics as they relate to the IMA's Statement of Ethical Professional Practice. He will present information on the Standards listed in the Statement of Ethical Professional Practice. These include Competence, Confidentiality, Integrity and Credibility.

Chris Parton and Donny Hayes will provide information on Disaster Recovery/Continuity of Operations Planning. They will provide tips on successful planning. How quickly your company can get back to business after a tornado, fire or flood often depends on emergency planning done today. Chris and Donny will also provide information on adopting business practices that are related to an influenza pandemic.

Trudy Phillips will provide information on record retention as it relates to industry standards and IRS regulations. She will also present information on file management. Trudy will discuss solutions to organizing files both in electronic and paper form.

**What are you waiting for?  
REGISTER TODAY!**

Take advantage of the Early Discount Rate by 2/1/08. Registration begins at 8:00 am and the seminar begins at 8:30 am. It concludes at 4:30 pm. Seminar fees include lunch, refreshment breaks, and all course materials. Course fees are payable in advance. Checks should be made payable to:

**Institute of Management Accountants – Gulf South Council**

**Register by mail:**

Mail the completed registration form to:

**Gulf South Council - IMA  
ATTN: Vicki Whitehead  
2833 Intrepid Cut  
Marietta, GA 30062**

**Register by fax:**

Fax the attached registration form to:

**205-220-0005**

**Attn: Cheryl W. Thomas**

*Early Registration Payments must be*

*Received by 2/01/08 and late registration by 2/08/08-mail to Vicki.*

**Any Questions:** Please call Robin Mangham, Council President at 205-220-2738 or Cheryl Thomas, 2<sup>nd</sup> VP at 205-220-3875.

PayPal registration available online at [www.gulfsouth.imanet.org](http://www.gulfsouth.imanet.org)

To learn more about the IMA, visit their website @ [www.imanet.org](http://www.imanet.org)



**Certified Management Accountants:** *Professionals Driving Business Performance.*

To learn more about IMA's CMA Certification program, please visit

<http://www.imanet.org/certification.asp>.

Institute of Management Accountants \* Please visit [www.imanet.org](http://www.imanet.org) to learn more  
10 Paragon Drive about the above topics.....  
Montvale, NJ 07645  
(800) 638-4427

### **Advancing the Profession**

IMA is dedicated to rebalancing the accountancy profession by educating society regarding the business building role of management accountants and finance professionals working inside organizations.

### **Certified Management Accountant (CMA®) – The Gold Standard**

Join a leading group of professionals who have advanced beyond the practical accounting skill set by earning IMA's prestigious global certification, the Certified Management Accountant (CMA®). Evolve into a strategic business partner committed to a standard of excellence grounded on a strong ethical foundation and a lifelong commitment to learning. Position yourself for career advancement and greater earning power. Gain a significant competitive advantage while demonstrating accounting, finance, information management and strategic planning skills necessary to drive business performance in the changing global economy. [Learn more](#)

### **Vision Statement**

The world's leading association for management accounting and finance professionals.

### **Mission Statement**

To provide a dynamic forum for management accounting and finance professionals to develop and advance their careers through certification, research and practice development, education, networking, and the advocacy of the highest ethical and professional practices.

**Atlanta Institute of Management Accountants – IMA Board of Directors for 2007-2008**

<u>Name</u>	<u>Position</u>	<u>Email</u>	<u>Phone</u>
Daniel Guelzo	President	<a href="mailto:DanielGuelzo@spherion.com">DanielGuelzo@spherion.com</a>	(678) 867-3125
Herbert Root	Treasure	<a href="mailto:herbert.root@us.vanderlande.com">herbert.root@us.vanderlande.com</a>	(770) 250-2820
Darla Worsham	Secretary & VP / Administration & Points	<a href="mailto:dworsham@bmpusa.com">dworsham@bmpusa.com</a>	(404) 605-0100
Daniel Hester	Director Registration Desk	<a href="mailto:dhester@harborcompanies.net">dhester@harborcompanies.net</a>	(770) 454-7325
Chris Cowart	Attendance Logs	<a href="mailto:ccowart555@bellsouth.net">ccowart555@bellsouth.net</a>	(770) 622-5445
Molly Gregware	Second @ Registration Desk	<a href="mailto:mgregware@acsysinc.com">mgregware@acsysinc.com</a>	(770) 206-1302
Vicki Whitehead	Points Administrator	vickillw@aol.com	(770) 300-8872
Jim Weisel	VP / Communications & Corporate Development	<a href="mailto:jimweisel@gmail.com">jimweisel@gmail.com</a>	(404) 643-6534
Robert Coons	Newsletter Editor	<a href="mailto:rcoons@randalpaulson.com">rcoons@randalpaulson.com</a>	(770) 650-7558
	Webmaster - website supported by Renee Nix	<a href="mailto:renee@computersolutions911.com">renee@computersolutions911.com</a>	(770) 926-7930
Darlene Dolph	Electronic Communications	<a href="mailto:ddolph@bellsouth.net">ddolph@bellsouth.net</a>	(404) 521-2454
Larry Loyed	Sponsors & Advertising	<a href="mailto:lloyed@aderholdproperties.net">lloyed@aderholdproperties.net</a>	(404) 526-9800
Steve Carter	Community Service	<a href="mailto:stevecarter@collectron-usa.com">stevecarter@collectron-usa.com</a>	(678) 937-0606
Chuck Bernstein	Second @ Community Service	<a href="mailto:csbwsm@aol.com">csbwsm@aol.com</a>	(678) 524-8686
Diane Ackerman	VP / CMA Programs	<a href="mailto:diane.ackerman@pilgrimspride.com">diane.ackerman@pilgrimspride.com</a>	(770) 393-5559
Tammy McLain	VP / Membership & Student Affairs	<a href="mailto:tmclain@acsysinc.com">tmclain@acsysinc.com</a>	(678) 393-2100
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Chuck Martin	Member Orientation / Retention	<a href="mailto:cprmartin@aol.com">cprmartin@aol.com</a>	(770) 337-9847
Chris Cobb	Student Relations / Dinners / Membership	<a href="mailto:chriscobb205@comcast.net">chriscobb205@comcast.net</a>	(678) 491-4091
Ed McAlexander	VP / Education for Dinner Meeting Programs	<a href="mailto:ed@bluetreeseearch.com">ed@bluetreeseearch.com</a>	(404) 467-5762
Marcine Johnson	Director of Education Programs	<a href="mailto:mjatas@bellsouth.net">mjatas@bellsouth.net</a>	(770) 924-8786
Jay Kimbrell		<a href="mailto:jkimbrell@na.ko.com">jkimbrell@na.ko.com</a>	(404) 526-1084
Bob Dow	VP / Education for Lunch Meeting Programs	<a href="mailto:robert.dow@agg.com">robert.dow@agg.com</a>	(404) 873-8706
Robin Mangham	Gulf South Council President	<a href="mailto:rmangham@bcbsal.org">rmangham@bcbsal.org</a>	(205) 220-2738
Marcine Johnson	Gulf South Council Regional Director	<a href="mailto:marcine@atasinfo.com">marcine@atasinfo.com</a>	(770) 924-8786

AT LARGE MEMBERS

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Jim Leimbach	<a href="mailto:jleim@bellsouth.net">jleim@bellsouth.net</a>	
Ellissa Vermillion	<a href="mailto:vermillion@bellsouth.net">vermillion@bellsouth.net</a>	(404) 238-3137