

News & Updates

Membership Drive

Year 2011

Chapter Membership Drive 2011 Membership Enrollment Program

***Enroll as a member now to receive discounts on IMA membership and the CMA Entrance Fee!

***Enroll now and receive 10% off of any membership, in addition to having the \$15 registration fee waived. Also, purchase the CMA Entrance Fee at the same time and receive a 25% discount (\$50 off).

***To redeem this offer, visit the IMA global website at www.imanet.org and go to the Online Store to enroll yourself as member. Enter promotional code: PPACMA1011 when checking out to receive your discount.

***Note: discount not applicable on the chapter sponsored CMA review course fee.

Website created!...

27-06-2009

Monthly Technical Membership Meeting

August 16, 2011



Technical Meeting Committee Chair- Jerry Stern, CPA, MBA

Welcome to the Peninsula Palo Alto Chapter of Institute of Management Accountants site of professional education, a one stop shop for your professional education and networking needs. At the chapter we provide you a wide variety of topics of interest to keep you abreast on the developments in finance and accounting profession. Unique to our chapter is our ability to bring in top notch speakers holding executive level positions to speak about their experiences in their daily conduct of business. For those aspiring to climb the ladders of the corporate financial management, these events also provide an excellent venue to network with these high profile individuals. Some of the meetings are specifically designed to be panel discussions to get wide variety of perspectives. Our meetings also provide cost effective CPE's. At the end, I would like to add that the chapter and the board strives to give 100% value to the membership through these technical sessions. I look forward to connecting with many of you and hope to see you at our upcoming event!

MEETING DATES

Monthly Meetings are generally held every 3rd Tuesday of the month, except during the months when joint events are held.

TIME

Regular Registration and Technical Session: 6:15 PM onwards

MEETING LOCATION

Biltmore Hotel
2151 Laurelwood Road, Santa Clara, CA 95054
Phone:408-988-8411

CONTINUING EDUCATION

3 CPE hours.

COST & REGISTRATION

"A Member is specifically, chapter member of IMA Peninsula Palo Alto Association and not of any other chapter of IMA or other association members."

"To affiliate with the IMA Peninsula Chapter, send an email to juzzenski@imanet.org"

Registration: Early Bird (July 31st) - Member-\$30; Non-Member- \$40
Regular (August 1st- August 15th - Member-\$35; Non-Member- \$45
Walk-in: August 16th- Member-\$50; Non-Member- \$60 (seats not guaranteed)

Cancellations will not be refunded/deferred or exchanged

Website Paypal registration closes on August 16th to give final head count to the hotel.

[Click here](#) to register for the forthcoming monthly meeting.

Topic Description and Details

"Enterprenuership"

Panel Discussion

Taking the Plunge: Perspectives from female entrepreneurs One of the greatest challenges for entrepreneurs is taking that first leap of faith to start your own business. Creating a new business involves great risk and the potential for great reward. Learn from women in both early and advanced stages of their ventures as they discuss the chances they took, the trade-offs they made, and the results of it all.

Speakers



Sudha Chadalavada- President, IMA-PPA

Sudha, a CPA and a CFE, has over fifteen years of experience in accounting and finance and currently specializes in SEC Reporting. Sudha has extensive and broad range of work experience including external audit, private company controllership and public company regulatory compliance and reporting. Sudha brings great breadth of expertise and experience in presenting and teaching the CMA review course. Sudha is the current President of the IMA Palo Alto Chapter and

also has served on the boards of several non-profit educational associations including IMA Silicon Valley Chapter, IIA San Jose Chapter, and ISACA SV Chapter as well as a club and district officer of Toastmasters' International.



Panelist- Katy Yeager, Vice-President, Accretive Solutions

Katy leads the Northern California Market of Accretive Solutions. Since she joined the firm in 1994, Katy has provided technical accounting advisory services, including IPO assistance and SEC reporting, to both established and newly public companies. She has assisted with the development of firm-wide methodologies for Sarbanes-Oxley compliance, as well as providing emerging companies with start-up services. Katy has also held various public accounting positions with Arthur Andersen in San Jose. She is a Certified Public Accountant who

graduated from Santa Clara University, where she is currently a member of the Accounting Advisory Board.



Panelist- Kristen Rampe, Senior Manager, Frank Rimmerman

As a Senior Manager with Frank Rimmerman, Kristen defines solutions and optimizes processes for the risk management and compliance requirement of a diversity of businesses. She has been instrumental in originating and nurturing a variety of initiatives at Frank Rimmerman, including a new service line for FCPA compliance, and the firm's Corporate Sustainability initiative and Five-Star Customer Service training program. Kristen earned a BS in Accounting from Butler University and is a Certified Public Accountant. She is a member of the AICPA and CaCPAs, and has served as board treasurer for the Palo Alto Art Center Foundation. In June, Kristen received recognition as a Woman to Watch by the AICPA/CaCPA. She lives in San

Francisco with her husband and two-year-old, identical twin boys.



Panelist- Kim Le, CEO and Founder, A2Q2

Kim is the CEO and Founder of A2Q2, a professional services firm specializing in business process optimization, internal controls, Sarbanes-Oxley compliance, and accounting projects. Kim started her public accounting career with Arthur Andersen, and experienced first-hand the challenges faced by public accounting firms through the Enron scandal. With 17 years of broad experience, Kim founded A2Q2 to realize her dream of working for the "perfect company." In 2010, the National Council of the Asian American Business Association selected Kim as the Asian Business Woman of the Year. In 2009, the California Public Utility Commission recognized Kim with the Women in Business Excellence Award. Kim

graduated from Arizona State University.



Panelist- Josette Ferrer, Managing Director, Clairant Advisors

Josette Ferrer is the founder, CEO, and a Managing Director of Clairant Advisors which she has grown into a thriving valuation practice serving Fortune 500 firms as well as smaller entrepreneurial companies. She particularly enjoys the challenges and rewards of growing a business and building a team as evidenced by her prior experience. Prior to founding Clairant Advisors, Josette was the U.S. Practice Leader of Marsh's Valuation Services Group. Her career includes serving as the Managing Director responsible for starting the S.F. Valuation Services Group of WTAS, Inc., a former subsidiary of HSBC Group. Prior to WTAS, Josette held a variety of valuation leadership positions with Huron Consulting

Group and Arthur Andersen. Josette has been a guest speaker for a wide variety of forums, including Financial Executives International, the Practising Law Institute, the S.F. Bar Association, and BIOCOM. Josette holds a B.S. in Business Administration, from U.C. Berkeley.