



The Association of  
Accountants and  
Financial Professionals  
in Business

GULF SOUTH REGIONAL COUNCIL



IMA's Certification for  
Accountants and  
Financial Professionals  
in Business

**Gulf South Council Professional Education Seminar  
12 Hours CPE April 19 & 20, 2018**

Wyndham Atlanta Galleria 6345 Powers Ferry Road NW Atlanta, GA 30339

To register visit: [www.gulfsouth.imanet.org](http://www.gulfsouth.imanet.org)

**Seminar Schedule**

**Thursday April 19, 2018 8 HRS CPE**

7:45AM – 8:15AM EST: Registration

8:15AM – 12PM (with 15 minute break):

“Pivot Tables & Excel 2016 Latest Hints”

Speaker: Bill Jelen, Mr. Excel

12:00PM – 1:00PM Lunch (included)

1:00PM – 4:45PM (with 15 minute break):

“Pivot Tables & Excel 2016 Latest Hints”

(continued)

Speaker: Bill Jelen, Mr. Excel

**Friday April 20, 2018 4 HRS CPE**

7:45AM–8:15AM EST: Registration

8:15AM – 10:00AM: 2 HRS CPE

“Road Map to Personal Safety”

Speaker: Richard Klopp, Mitigation Threat Expert, Edge Point Global

10:00AM – 10:15AM: Break

10:15AM – 12:00PM: 2 HRS CPE

“2018 Tax Law Impact”

Speakers: Steve Henley, National Tax Practice Leader, CBIZ – Atlanta, GA; Nathan Smith, National Tax Office, CBIZ – Tampa, FL

12:15PM – 1:30PM Gulf South Council Meeting  
Open to all IMA Gulf South Council Members

**Lunch will be provided for the Thursday session. Refreshments will be included for both sessions. All attendees will need to sign in for each time slot in order to receive the full 12 hours of CPE.**

**Hotel Information**

Wyndham Atlanta Galleria  
6345 Powers Ferry Road NW  
Atlanta, GA 30339

Rooms are \$129/night plus taxes, charges, and other fees. Call 800-207-4505 or 770-955-1700 or online at: [www.wyndham.com](http://www.wyndham.com) to make reservations. Use group code: “Gulf South Council Meeting”.

**Deadline for reservations is March 28, 2018.**

**Register online & make secure payments via PayPal at:**  
[www.gulfsouth.imanet.org](http://www.gulfsouth.imanet.org)

**You can also mail your registration form and payment to:**  
Gulf South Council  
Attn: Vicki Whitehead  
2833 Intrepid Cut Marietta, GA 30062

**Make checks payable to IMA Gulf South Council**

**Seminar Pricing**

Pay by: April 16<sup>th</sup> After April 16<sup>th</sup>

**Thursday Only OR Both Thurs. & Fri. Sessions:**

Member	\$210	\$250
Non-Member	\$250	\$290
Student	\$50	\$70
Retiree	\$130	\$150

**All Attendees – Thurs. Half Day (AM or PM):**

	\$105	\$125
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**All Attendees – Friday Half Day:**

	\$20	\$40
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**REGISTRATION FORM**

Please print clearly & photocopy if needed

Name & Certification (i.e. IMA, CFM, CPA, CIA)

Title

Company

Mailing Address

City, State, Zip

Phone # IMA Chapter IMA Member ID

Email

Registrations must be received by April 17, 2018 to be guaranteed. All fees must be received by April 16, 2018 or arrangements made to pay on the day of the session.



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Questions? Please Contact:  
Robert Coons, Gulf South Council President  
Email: [rcoons@randallpaulson.com](mailto:rcoons@randallpaulson.com)  
Office: 770-650-7558 x124

**Speaker Information**

**Bill Jelen – Mr. Excel** is the author of 43 books about Microsoft Excel, Power Pivot and Power View. He is also a publisher of books about Microsoft Office. He also writes a monthly Excel article for Strategic Finance Magazine and the weekly CFO Learning Pro - Excel Edition newsletter. In addition, he produces a daily 2-minute podcast about Excel. He travels extensively doing live Power Excel seminars. Microsoft Certified Trainer. Specialties: Microsoft Excel and VBA code for Microsoft Excel.

**Rick Klopp** has more than 10 years of specialized tactical training preceded by international security and management responsibilities. He has worked with various civilian, military and law enforcement officials in developing and implementing training curriculums in the area of weapons, tactics, combatives, and trauma medicine. He is an NRA instructor, a medical professional, a law enforcement firearms instructor, and is currently working with Edge Point Global in Alpharetta, GA as a Threat Mitigation Expert.

Rick will discuss issues of personal safety. A pistol, a knife, and pepper sprays are all excellent tools, but if you don't see the attack coming, they quite often don't do you any good. He stated that "Situational Awareness is the key to self-defense."

Outline for Mr. Klopp's presentation

**ROADMAP TO PERSONAL SAFETY**  
**By Rick Klopp**

1. Predict
  - a. The Concept of Dangerousness
  - b. Staying "Left of Bang"
  - c. Situational Awareness
  - d. Recognizing Risks
2. Prevent
  - a. Avoidance
  - b. What comes first – skills or confidence?
  - c. The Psychological Edge
3. Protect
  - a. The Typical Response
  - b. What can I expect?
  - c. 4 Things to Remember
  - d. The OODA Loop
4. Street Smart Quiz

**Steve Henley with CBIZ** has 30 years' experience in serving the tax needs of clients in a variety of industries including retail,

distribution and manufacturing, professional services, technology and communications. In serving as lead tax engagement executive, Steve's focus is identifying and executing value creating strategies to meet the needs of his clients in a variety of technical areas, such as revenue recognition, acceleration of deductions, research and experimentation credits, state and local tax minimization, M&A tax structures, international tax planning and tax implications of compensation programs.

Steve began his career in the Big Four arena and was admitted to partner with Ernst & Young in 1991. During his career with E&Y, he served many leadership roles including Southeast Area Industry Leader for Tax Services to the Technology industry. After 17 years with E&Y, Steve joined a regional CPA firm to expand the firm's presence in the Atlanta area. In 2006, Steve accepted a new challenge when he joined CBIZ as National Tax Practice Leader. Steve's current responsibilities include leading CBIZ's tax practice nationally and overseeing the integration of the company's 30-plus tax offices throughout the country and centralizing all related operational, quality control and tax procedure standards. In addition, Steve is responsible for identifying and leveraging tax solutions throughout the firm and is directly involved in key executive talent acquisition.



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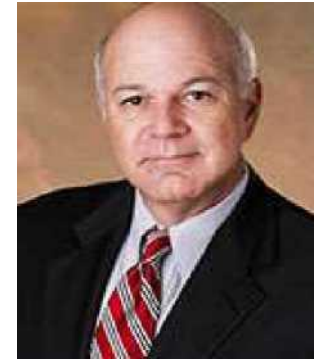
**Nathan Smith** is a Director in the CBIZ National Tax Office, bringing over 19 years of experience in public accounting to provide technical support and strategic solutions for the firm's tax practice. Nathan leads the development of practice aids and tactical approaches used in responding to industry and Federal tax developments in a variety of subject matter areas. Nathan also consults nationally to facilitate delivery of client service opportunities and solutions, contributes as an author and editor to the firm's tax thought leadership publications and assists with the development and implementation of national tax policies and procedures.

Prior to joining the National Tax Office, Nathan provided a broad range of tax and consulting services to both public and closely-held businesses and individuals in the Tampa Bay practice office. His principal fields of practice involved complex partnership arrangements with venture capital and private equity funds, transaction support for stages of business formation to acquisitions and liquidity events, tax accounting methods, and market-specific subjects for the professional service and hospitality industries.

**Meet Our Speakers:**



**Bill Jelen**



**Steve Henley**



**Rick Klopp**



**Nathan Smith**