



The Association of  
Accountants and  
Financial Professionals  
in Business



IMA's Certification for  
Accountants and  
Financial Professionals  
in Business

**Gulf South Council Professional Education Seminar**

12 hrs CPE April 19 & 20, 2018

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

Visit [www.gulfsouth.imanet.org](http://www.gulfsouth.imanet.org) to register

All attendees will need to sign in for each time slot to receive full 12 hrs CPE and all sessions will include refreshments with lunch on Thursday

**Thursday 4-19-18 8 HRS CPE**  
**Registration Starts 7:45AM EST**

Morning Times: 8:15AM - 10AM  
with 15 min Break 10:15AM - Noon  
Noon to 1PM lunch included  
Afternoon Times: 1PM - 2:45PM  
with 15 min Break 3PM - 4:45PM

**Presentation:** Pivot Tables and Excel 2016 & Latest Hints by Mr. Excel, Bill Jelen

**Friday 4-20-18 4 HRS CPE**  
**Registration Starts 7:45AM EST**

Morning 8:15AM - 10AM 2 HRS CPE

**Presentation:** Road Map to Personal Safety by Richard Klopp, Mitigation Threat Expert with Edge Point Global

**Break 10AM to 10:15AM**

Mid-Morning 10:15AM-Noon 2 HRS CPE

**Presentation:** 2018 Tax Law Impact by Steve Henley, National Tax Practice Leader with CBiz Atlanta, GA & Nathan Smith, National Tax Office with CBiz Tampa, FL

Gulf South Council Meeting  
12:15 - 1:30PM

**Hotel Information**

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

Sleeping rooms are \$129/night plus taxes, charges, and other fees. Call 800-207-4505 or 770-955-1700 or use website [www.wyndham.com](http://www.wyndham.com) to make reservations. Use group code: Gulf South Council Meeting. **Deadline for reservations is 3-28-18**

Make secure payments via PayPal [www.gulfsouth.imanet.org](http://www.gulfsouth.imanet.org)  
E-mail registration form to: [vickillw@aol.com](mailto:vickillw@aol.com)  
Make checks payable to IMA Gulf South Council. Include registration form and mail to Gulf South Council  
Attn: Vicki Whitehead  
2833 Intrepid Cut Marietta, GA 30062

Registrations must be received by 4-17-18 to be guaranteed. All fees must be received by 4-16-18 or arrangements made to pay at sign-in

**Cost Information**

Pay by: 4-16-18 After: 4-16-18

**Both Thursday and Friday Sessions**

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

**All Attendees Thursday Half Day**

	\$105	\$125
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**All Attendees Friday Only:**

	\$20	\$40
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**REGISTRATION INFORMATION**

Please print clearly & photocopy if needed

\_\_\_\_\_  
Name & Certification – CMA, CFM, CPA, CIA

\_\_\_\_\_  
Title

\_\_\_\_\_  
Company

\_\_\_\_\_  
Mailing Address

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

\_\_\_\_\_  
Phone # IMA Chapter & Member ID

\_\_\_\_\_  
Email:



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Any Questions Please Call:

Robert Coons, Council President

Email [rcoons@randallpaulson.com](mailto:rcoons@randallpaulson.com)

Office: 770-650-7558 x 124

#### Presenter Information:

**Mr Excel – Bill Jelen** Author of 43 books about Microsoft Excel, Power Pivot and Power View. He is 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 produce a daily 2-minute podcast about Excel. I do 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



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responsible for identifying and leveraging tax solutions throughout the firm and is directly involved in key executive talent acquisition.

**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.

### Visual Gallery:

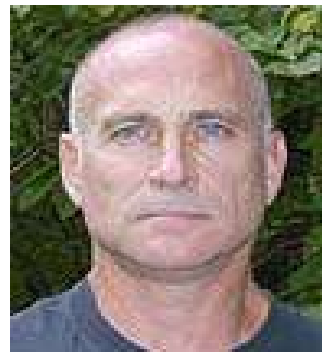
**Bill Jelen**



**Steve Henley**



**Rick Klopp**



**Nathan Smith**

