

Pat Martin

From: imapccouncil@yahoogroups.com on behalf of Mark Hendrickson
mark_hendrickson@verizon.net [imapccouncil] <imapccouncil-noreply@yahoogroups.com>
Sent: Friday, October 14, 2016 9:01 PM
To: Yahoogroups
Subject: [IMA P&C Council] Corrected Minutes
Flag Status: Flagged

Minutes of IMA P&C Council meeting
13 August 2016

Attendees: Lee Klebe, Mark Hendrickson, Liz Pectal, Amy Blechinger, Jessie Reid, Bill Perry, Pat Martin, Frank Homburger, John Coughlan

Lee Klebe called the meeting to order at 9:09 AM.

Minutes from last meeting were approved with updates. Updated minutes will be issued through Yahoo Groups.

Treasurer report - Pat Martin: Balance is \$18,300.13. Will have student activities check activity for August as noted in the treasurer's report that was sent you prior to the meeting. Treasurer's report was accepted.

Pat made a motion to approve the June 30, 2016 balance for reporting to IMA Global. Motion was accepted, approved.

Chapter & VP Activity reports:

Delmarva – Jessie Reid – 4 hours of CPE in July with Mr. Excel, with almost 40 people in attendance. The speaker costs \$2,500. September meeting will have 2 hour of CPE, on Time Management. The Shore Fraud Conference is in November.

Richmond – Liz – Summer lunch meeting in July for 1 hours of CPE, with around 15 people. Start dinner meetings in September.

Nations Capital – Amy Blechinger – Had a dinner meeting on July 20 at UMUC. Next meeting is on Cybersecurity on August 17, and the annual picnic is on August 28. Next breakfast meeting is September 13, with dinner meetings in September and October.

Baltimore - Lee Klebe – Three hour CPE session at Legends staffing in Baltimore for June and July, with August meeting on the 25th. Networking meeting at the Engineers Club in July.

Skyline – No report.

Global Director - Frank Homburger – As of end of fiscal year, IMA Global had revenue of ~\$29M, and expenses of ~\$30M, with operating loss of ~\$300K, and \$616K gain on investment portfolio. 81,722 members, and have passed 50,000 in CMA's awarded.

The investment portfolio was moved around June 21 to Vanguard from Merrell Lynch.

The CMA first marketing campaign will be formally unveiled on September 8, 2016, via webinar. The ads start on September 12.

Next Global board meeting is October 22, 2016 in Jacksonville, FL.

SCMS – Next meeting at the IMA board meeting October 23, 2016.

John Coughlan – have 10 students in the CMA prep class program that just started.

Old Business: None.

New Business: None

Next meeting: October 15, 2016, 9:00 AM. After that meeting, December 10, 2016

Meeting adjourned at 9:53 AM.

Posted by: Mark Hendrickson <mark_hendrickson@verizon.net>

[Reply via web post](#) • [Reply to sender](#) • [Reply to group](#) • [Start a New Topic](#) • [Messages in this topic \(1\)](#)



[Have you tried the highest rated email app?](#)

With 4.5 stars in iTunes, the Yahoo Mail app is the highest rated email app on the market. What are you waiting for? Now you can access all your inboxes (Gmail, Outlook, AOL and more) in one place. Never delete an email again with 1000GB of free cloud storage.

VISIT YOUR GROUP

YAHOO! GROUPS

• [Privacy](#) • [Unsubscribe](#) • [Terms of Use](#)