

Institute of Management Accountants  
Cleveland East Chapter  
23700 Chagrin Blvd.  
Beachwood, OH 44122

**Controller's Workshop –  
Friday, November 21, 2008**



## SEMINAR FACULTY

**Jeffrey C. Susbauer** (Ph.D., The University of Texas at Austin, sometime towards the middle of the last century) is Associate Professor Emeritus and currently Chairman, Department of Management & Labor Relations in the Nance College of Business Administration at Cleveland State University. He concurrently is Director of the College's Master of Labor Relations and Human Resources (MLRHR) and Health Care Administration MBA Programs. He has had an active consulting practice for most of the 38+ years he has been in Cleveland and at Cleveland State working with privately held business owners on their strategies for growth and succession. He is a frequent speaker to trade associations and their members nationally and internationally. He and his partner, Dr. Robert J. Baker, Jr., created and have conducted a five month long Strategic Planning Course offered to private business owner/CEOs in cooperation with the Chambers of Commerce in Cleveland, Columbus, Cincinnati, Dayton, Findlay, Nashville and Louisville. Fall 2008 marks the 29th consecutive year the course is being offered through COSE in Cleveland. Dr. Susbauer's presentation will extract materials from that course

**Robert T. Sullens** practices as a CPA specializing in taxes and tax and management consulting. He is a graduate of John Carroll University with a BS in Accounting and received an MBA and a Doctorate in Business Administration from Case Western and Kent State Universities, respectively. He is Professor Emeritus and former Chair of the Department of Accounting of John Carroll University and also was a visiting Professor of Accounting at Kent State University. Dr. Sullens also served as a CFO in industry for many years specializing in inventory control and pricing.

**Pat McIntyre** is a partner with Weston Hurd. He practices in corporate transactional matters with particular experience in mergers, acquisitions and divestitures, and finance and commercial real estate, including structuring and negotiating joint ventures, development agreements, licensing agreements, distribution agreements, non-competition and non-solicitation agreements and employment and consulting agreements in a variety of industries.

After graduating from the Pennsylvania State University, Mr. McIntyre spent several years with Marriott Corporation and the Continental Companies in various management positions before obtaining his J.D. from Cleveland-Marshall College of Law in 1989. He is admitted in Ohio, the U.S. District Court for the Northern District of Ohio and the U.S. Supreme Court. He is a member of the American, Ohio and Cleveland Bar Associations and the International Council of Shopping Centers.

**Ron DiMattia** has been involved in the valuation of businesses for over 23 years. He founded Corporate Value Partners, Inc. ten years ago to help clients with a broad range of valuation, corporate finance, litigation and bankruptcy matters. He has significant experience in technical valuation issues, financial analysis, forecasts/projections, acquisitions and divestitures, shareholder value measurement and forensic accounting. He is President of his current firm and previously performed financial advisory services for a regional accounting firm and prior to that was a Senior Manager in a "Big Four" accounting firm's financial advisory services practice.

In the past Ron has served on the AICPA Business Valuations Subcommittee and was appointed to the National Accreditation Commission and the Governing Council of the AICPA. Currently he is an instructor for the AICPA's National Business Valuation School, as well as its introductory valuation courses and fair value accounting course. He is a frequent speaker at a wide range of events, including local meetings of the Institute of Management Accountants.



The Cleveland East Chapter presents

# Controller's Workshop

23700 Chagrin Blvd  
Beachwood, OH  
Friday, November 21, 2008  
8:00 am – 4:30 pm

A one-day seminar for controllers, CPAs, CMAs, CFMs, and accountants who are interested in staying up to date on topics of interest or new rules and laws.

- ✓ Federal tax update
- ✓ Strategic Planning 101
- ✓ Contracts - what you need to know about creating or reading contracts
- ✓ What's it worth? An overview of Business Valuation Concepts
- ✓ US GAAP and IFRS Convergence

This program meets the ICMA guidelines for 8 hours CPE credit for CMAs and CPAs



## SEMINAR OUTLINE

**7:30 – 8:00 am Registration & Continental Breakfast**

**8:00 – 10:00 am  
Federal Tax Update**

- New tax law changes
- Hot topics

**10:00 – 10:15 am Morning Break**

**10:15 – 11:45 pm  
Strategic Planning 101**

- What it is and what is isn't
- Different plans for different environments

**11:45 - 12:15 pm Lunch provided**

**12:15 pm – 1:45 pm  
Contracts – What controllers need to know**

- Basics of what to watch for when creating or signing contracts

**1:45 – 2:00 pm Afternoon Break**

**2:00 – 3:30 pm  
What's it worth? Business Valuations**

- Commonly used methods
- Assumptions & implications of methods

**3:30 – 4:30 pm  
US GAAP and IFRS Convergence**

- Brief overview / recent developments
- How this ties into FASB

## Registration Form

Friday, November 21, 2008

Mail or Fax to:

**Institute of Management Accountants**  
Attention: Sandy Brenner  
BASF Construction Chemicals  
23700 Chagrin Blvd.  
Beachwood, OH 44122  
Phone: (216) 839-7288 Fax: (216) 839-8819

Name \_\_\_\_\_  
CMA CFM CPA (circle if applicable)

Title \_\_\_\_\_  
Company \_\_\_\_\_  
Street \_\_\_\_\_  
City, State, Zip+4 \_\_\_\_\_

Telephone: (\_\_\_\_) \_\_\_\_\_  
E-mail: \_\_\_\_\_

Registration begins at 7:30 a.m. with the course starting at 8:00 a.m. and concluding at 4:30 p.m. Tuition includes continental breakfast, lunch, refreshment breaks, and course materials. Course fees are payable in advance. Make check payable to the **Institute of Management Accountants**. Sorry no credit cards.

Nickname for Badge \_\_\_\_\_

IMA Member Number

IMA Chapter

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**Cost \$99 IMA Member  
\$125 Nonmember**