



IMA's 2021 Year in Review: A Purpose-Driven Organization Built on Trust



The Association of
Accountants and
Financial Professionals
in Business

Financial and operational highlights from
July 1, 2020 to June 30, 2021

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The Association of
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in Business

Message from the Chair

This year has been marked by difficulty but also stories of resilience. We have all had to adapt to a new normal, upskill in technology, and consider ways of making a difference for the better in our lives and careers.

I believe I have been the first IMA Chair to run all board and committee meetings virtually, and it is a credit to our volunteers and members that we collaborated virtually so seamlessly.

While IMA is a community of talented management accountants, this year, I saw that we are so much more. We are people who never hesitate to help those in need, whether it is a colleague struggling with a work-life balance issue or a student who is eager to begin their career but unsure of how to begin.

From virtual Student Leadership Conferences to our Annual Meeting, IMA made sure it could be there for its members at a time when they all faced unprecedented levels of uncertainty.

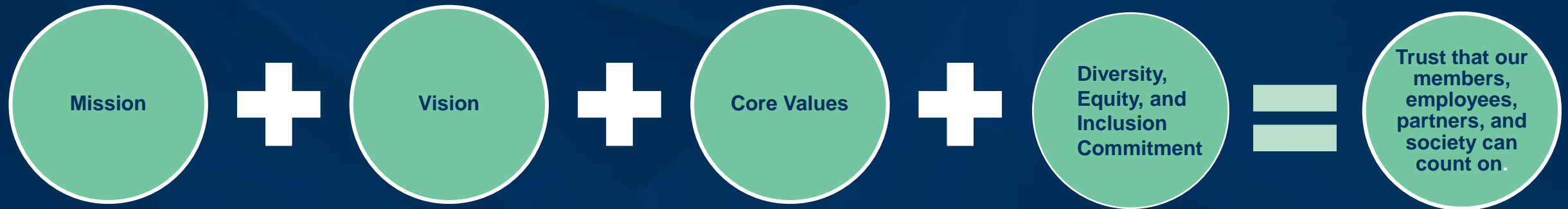


**Paul E. Juras, Ph.D., CMA,
CSCA, CPA**
IMA Chair 2020-2021



The Association of
Accountants and
Financial Professionals
in Business

The Building Blocks of Trust



To provide a forum for research, practice development, education, knowledge sharing, and advocacy of the highest ethical and best business practices in management accounting and finance.

To be the leading resource for developing, certifying, connecting, and supporting the world's best accountants and financial professionals in business.

- Respect for the Individual
- Teaming to Achieve
- Passion for Serving Members
- Highest Standards of Integrity and Trust
- Innovation and Continuous Improvement

Fundamental to our core values, IMA is committed to creating, nurturing, and advocating for a diverse, equitable, and inclusive member community, accounting and finance profession, and organizational workplace.



The Association of
Accountants and
Financial Professionals
in Business

IMA's Foundation in Trust

- Members of IMA's Committee on Ethics (Susan E. Bos and Curtis C. Verschoor) have been recognized by Trust Across America as Thought Leaders in Trust
- IMA President and CEO Jeff Thomson is a Trust Across America Lifetime Achievement recipient
- All IMA members must comply with the *IMA Statement of Ethical Professional Practice*
- IMA offers the IMA Ethics Series learning courses free to members
- The IMA Ethics Helpline serves as a resource for members experiencing ethical dilemmas



IMA recognizes Curt Verschoor's lasting impact on ethics training and education. Curt was a longtime member of IMA's Committee on Ethics, editor of the *Strategic Finance* Ethics column for 20 years, and a significant contributor to the development and revisions of the *IMA Statement of Ethical Professional Practice*.



The Association of
Accountants and
Financial Professionals
in Business

IMA's Strategic Goals for Long-Term Health of the Organization

Win

Win additional market share by growing the CMA program in the U.S. and globally

Drive

Drive member retention and loyalty in all regions by delivering tangible value through relevant programs, products, and services

Raise

Raise awareness in the Student and Academic market to expand the membership pipeline and reach CMA-certified young professionals of tomorrow

Master

Master technology that directly impacts IMA members and our value proposition

Prepare

Prepare for an unpredictable future by investing in capabilities that support agility and resilience

Highlights from Fiscal Year 2021:
A Healthy Organization with
Resources to Invest in Member
Benefits

Resilience in the Face of Challenging Market Conditions

Key metrics remain healthy with resources to further invest in member benefits (i.e., new website with enhanced user experience, digital vision and roadmap, new educational courseware, awareness campaigns)

- **Total active CMAs:** 46,859 (an all-time high)
- **New CMA candidates:** 29,589
- **Total CMA candidates in the pipeline:** 75,666
- **New CMAs awarded:** 12,926 (13% of all CMA certificates issued over the 49-year history of the program were issued in fiscal year 2021)
- **Total IMA membership:** 139,488



Certified in Strategy and Competitive Analysis (CSCA[®])

A certification program designed for management accountants to learn, refine, and validate competencies in strategic management and competitive analysis.

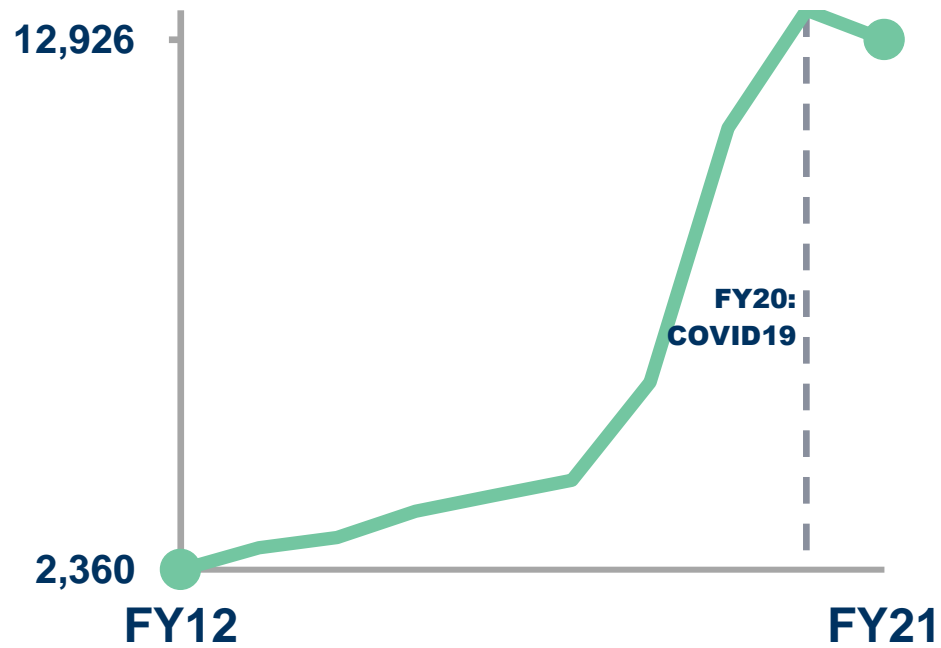
IMA members who have passed both parts of the CMA exam can:

- Enhance and expand their knowledge base
- Build on their CMA to complement and expand strategic thinking and analysis skills
- Differentiate themselves among accounting and finance talent

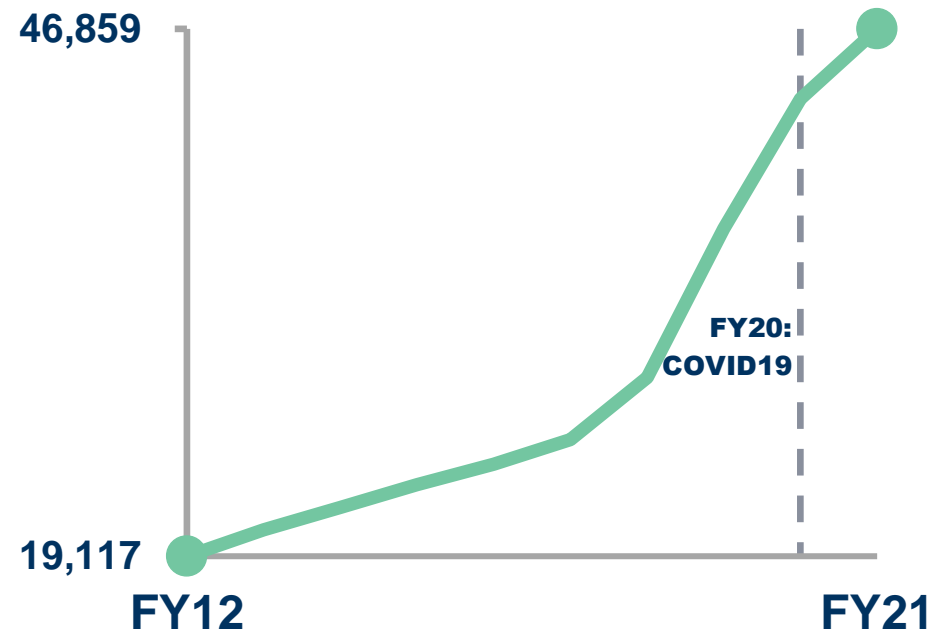


Resilience in the Face of Challenging Market Conditions

New CMAs

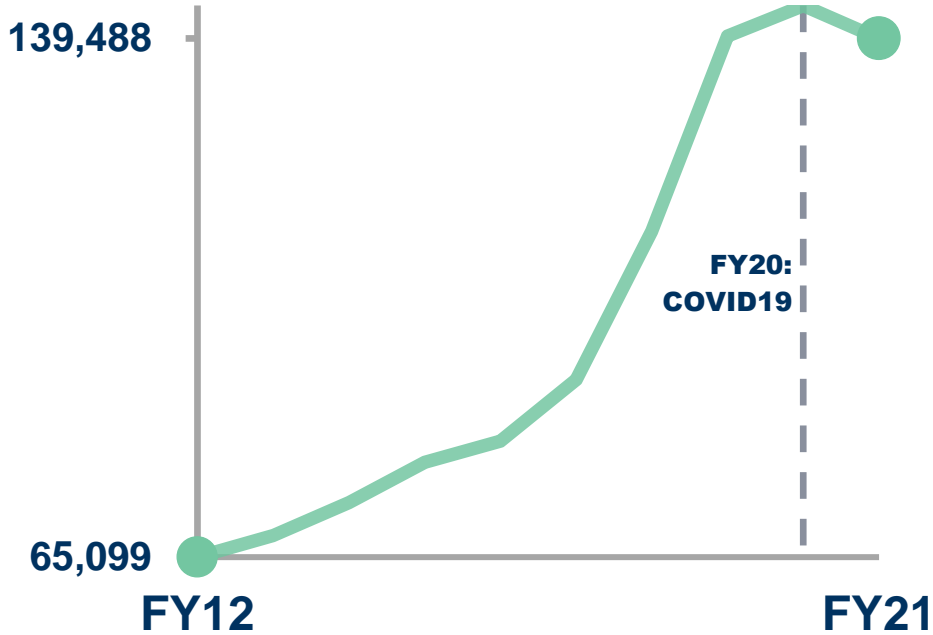


Active CMAs

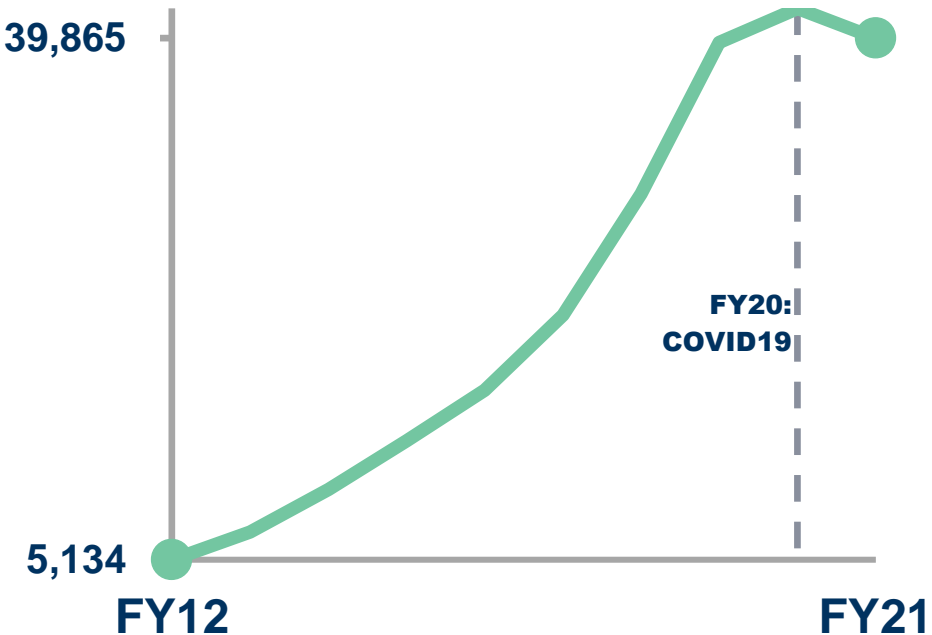


Resilience in the Face of Challenging Market Conditions

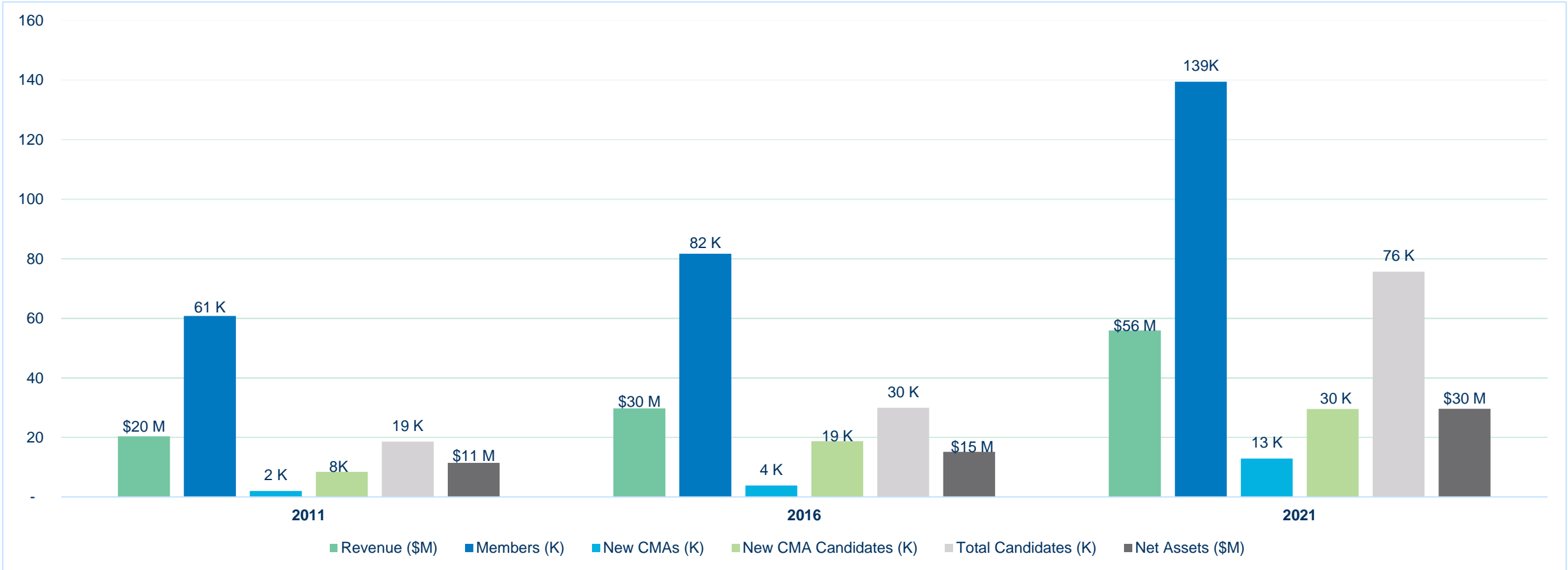
Membership



Student Membership



IMA's Journey of Growth



Comprehensive and Innovative
Learning and Events When Our
Members Needed Added Support

IMA's Management Accounting Competency Framework

Essential Knowledge and Skills to Stay Relevant in the Digital Age

The Competency Framework serves as the basis for skills assessment, career development, and talent management.

Six domains:

- Strategy, Planning & Performance
- Reporting & Control
- Technology & Analytics
- Business Acumen & Operations
- Leadership
- Professional Ethics & Values



IMA's Global Educational Offerings



Continuing Education

- 1,400+ eLearning courses (English)
- 190+ eLearning courses (Chinese)
- 160+ podcasts (140 countries)
- 50 WeChat courses (China)
- 180+ IMA webinars
- 500+ chapter webinars
- Partner webinars (English and Chinese)



Career Resources

- IMA Management Accounting Competency Framework
- CareerDriver® career assessment and management tool
- Job Board
- Career Connection Webinars
- Career Articles



Global Conferences

- Student Leadership Conference
- China Annual Conference
- Middle East Annual Conference
- AsiaPac Conference
- Women's Leadership Summit
- Virtual conferences/events globally



Live Events

- IMA Events
- Chapter events
- Elite Club events



Soft Skills Development

- Leadership Academy webinars, workshops and e-learning courses



Ethics Series

- Courses
- Workshops



Education for the Future

- Technology & Analytics Center
- Technology Education:
 - IMA Data Analytics & Visualization Fundamentals Certificate®
 - Blockchain 101 by IMA
 - IMA Excel Series
 - TechTalk webinars
- Strategy Management:
 - IMA Strategy and Competitive Analysis Learning Series®
 - IMA's FP&A Series
 - Strategic Management webinars

More Opportunities for Members to Learn in 2021

With the pandemic affecting all parts of the globe in fiscal year 2021, IMA significantly ramped up its array of learning opportunities for its members worldwide.

English-Language

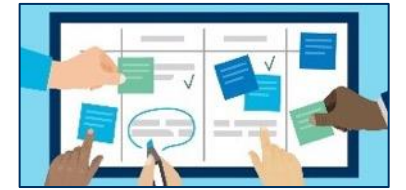
- 70 new eLearning courses (for a total of 1,400+ eLearning courses)
- 6 Leadership Academy programs
- 79 free webinars (a record number!)
- 69 free podcasts

Chinese-Language

- 197 eLearning courses
- 11 new, well-received WeChat courses (for a total of 50)
- 97 information sessions on TikTok



Ethics in a Digital Age
eLearning course



Agile & Scrum eLearning
course series



Cybersecurity Risk &
Mitigation eLearning course



Count Me In® podcast

Free Continuing Professional Education (CPE) for Members

Offered **155+ free continuing professional education (CPE)** credits during the year (English language), which is a 47% increase from fiscal year 2020.

Offered 197 eLearning courses (Chinese language) in fiscal year 2021, a 46% increase over fiscal year 2020.

As of July 1, 2021, all courses in IMA's Ethics Series became complimentary member benefits

Popular eLearning courses offered as free member benefits included:

- Sustainability and Value Creation
- Leadership Foundations for Management Accountants
- Agile & Scrum Series (two courses)
- U.S. GAAP vs IFRS: Nonfinancial Assets
- Cybersecurity Risk and Mitigation
- Ethics in the Digital Age



Virtual Events with a Global Reach



Three-day virtual (and first ever) Annual Conference & Expo with 53 sessions (attracted 1,000+ registrants from 36 countries).



This special one-day virtual event provided members with a way to earn continuing professional education (CPE) while learning from experts in the fields of finance and accounting.



For the second year in a row, IMA's Annual Meeting of Members was offered virtually (at two different times in the day) to ensure greater inclusion of our global membership. This will be offered virtually moving forward.

Virtual Student Leadership Conference

- More than 1,000 registrants from nearly 300 schools around the world attended.
- Students heard advice on leadership from Fortune 500 CEO David Burritt, CMA, of U.S. Steel Corporation, and Unmuted CEO, Rachel Druckenmiller.
- Students connected with companies for potential internships and full-time positions, as well as learned about graduate school opportunities and exam preparation offerings at a Virtual Career Expo.



Attendees shared their experience attending the event live on Instagram and Twitter using the hashtag #virtuallsc20

Virtual Women's Leadership Summits

Three virtual Women's Leadership Summits were held during fiscal year 2021 in the U.S., Europe, and the Middle East. These summits enabled professionals from around the globe to take part in sessions on topics such as transformative leadership, emotional intelligence, and ethics. They also received the opportunity to network with peers and share career advice.



Participants in the IMA's U.S. Women's Leadership Summit held on October 9, 2020.



A participant in the Middle East Women's Leadership Summit, held April 28, 2021, proudly displays her certificate on LinkedIn.



Speakers at the Women's Leadership Summit in Europe held on October 15, 2020.

Regional Educational Highlights: China



In China, 197 eLearning courses were offered in fiscal year 2021.

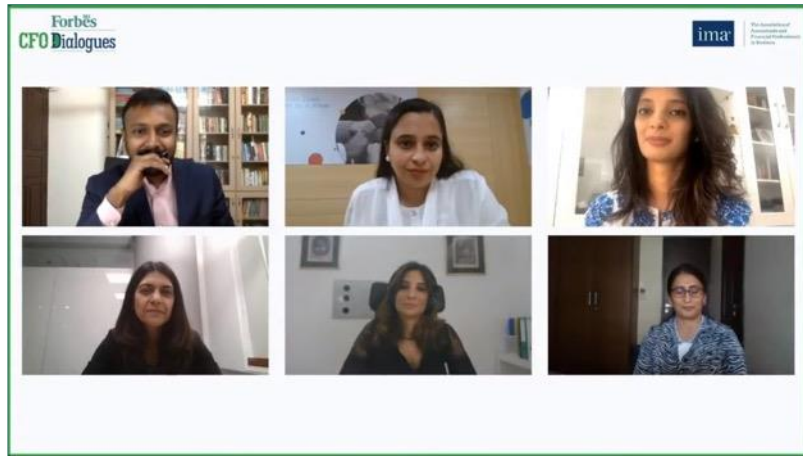
In addition, the China Education Team delivered 11 new, well-received WeChat courses (for a total of 50) and 97 information sessions on TikTok.



As COVID restrictions lifted, the team also worked with the approved review course providers to offer 54 in-person events and an additional eight events with the Elite clubs.



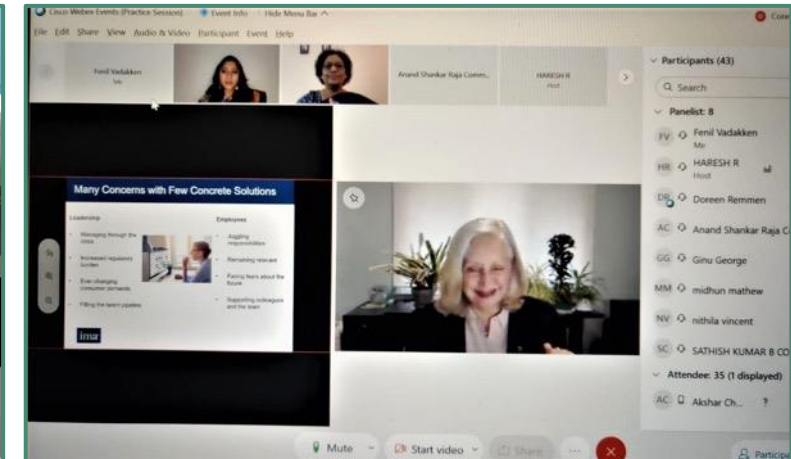
Regional Educational Highlights: India



Forbes CFO Dialogues held in January, March, and June featured more than 13 CFOs discussing topics like “How CFOs are becoming game changers in the new world.”



More than 180 participants in “The Red Brick Shark Tank Challenge 2020,” in association with IIMA, one of the top business schools in India.



Christ University International Conference with keynote speaker Doreen Remmen, then IMA CFO (April 2021).

Regional Educational Highlights: Middle East



More than 500 students participated in the Middle East and India IMA Student Case Competition.

IMA Middle East Virtual Student Leadership Conference

July 18, 2020

06:30 PM - 09:20 KSA Time

[Register Now](#)



First virtual Middle East Student Leadership Conference (1,500 participants).

Regional Educational Highlights: Southeast Asia



“Transforming the Finance Function with RPA,” IMA webinar held virtually on March 24, 2021.



“Adding Value as You Move Up Career Paths for Accounting and Finance Professionals,” IMA and INSEAD webinar, held virtually on May 19, 2021.



“Empowering Finance and Accounting Professionals,” AsiaPac Conference, held virtually on October 17, 2020.



IMA's First AsiaPac Student Case Competition 2021, held May 22, 2021.

Regional Educational Highlights: Europe



2021 IMA Europe Student Case Competition

29 June 2021



The Association of Accountants and Financial Professionals in Business

Competition winners included: KIMEP University, Kazakhstan; Rennes School of Business, France; and The Bucharest University of Economic Studies, Romania.

New Webinar!

Becoming a Successful Business Partner



Anders Liu-Lindberg
COO and CMO
Business Partnering Institute



Valentina Coco
Ambassador of EMEA
Recruitment, Finance Expert



Alain Mulder
Senior Director Europe
Operations, IMA

February 25, 2021, 12:00 - 13:30 CET via Zoom



“Becoming a Successful Business Partner” webinar organized in collaboration with EMEA Recruitment.

Management Accounting Revolution Through Digital Transformation: Threat or Opportunity?

Thursday 27 May – 13:30-15:00



PAUL JURAS, PH.D., CMA, CPA
Global Chair of IMA,
Vander Wolk Professor of
Management Accounting and
Operational Performance at
Babson College, USA

CMA discussion with Paul Juras, Ph.D., CMA, CPA, Global Chair of IMA, with EEA-European Accounting Association, at a virtual Congress about the future of management accounting.

Member Testimonials

“The Mid-America Council just concluded its virtual spring conference today. I just wanted you to know that Amy Renner did a fantastic job coordinating this event. We will be good to go on our own for the next webcast (though we are hoping to do our next conference in person).”

“Well presented and optimized frontline learning [IMA ethics course]. Also, the examples were very relevant ... ethical decisions that happen in the real world.”

“The interactive approach kept me engaged throughout the [RPA] course. Also, it was a fun way of learning!”

“...Congratulations on putting together such a fabulous conference [ACE2021]. This was one of the best-run virtual conferences I have attended with great content...”

“The content [Data Analytics & Visualization Course] was excellent. The tools for learning were very, very effective - with enough variety and examples to keep the sessions interactive and interesting.”

Establishing New Paradigms in
DE&I, Sustainable Business, and
Technology and Analytics

Integrated Content for Comprehensive Learning

IMA Research and Thought Leadership supports the development of...



**eLearning courses
and webinars**



Count Me In® podcasts



***Strategic Finance*
articles**

Diversity, Equity, and Inclusion (DE&I) Research and Thought Leadership

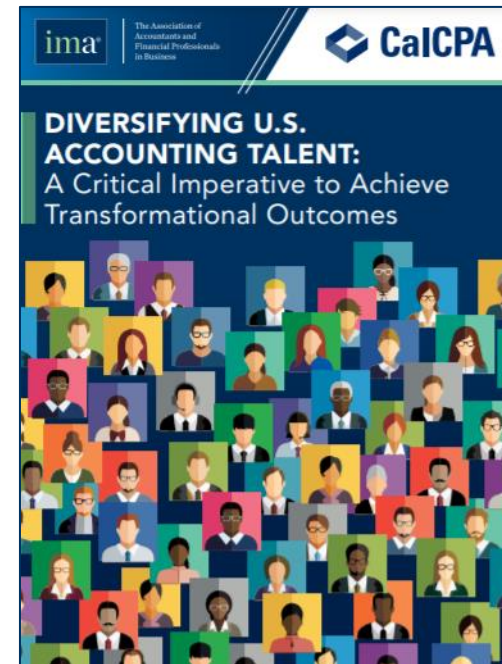
Global DE&I research (U.S. study completed and international studies in progress) in partnership with:

- California Society of CPAs (CalCPA)
- International Federation of Accountants (IFAC)

Other research contributors include:

- National Association of Black Accountants (NABA)
- Association for Latino Professionals for America (ALPFA)
- National Society of Black CPAs
- The PhD Project
- Nine U.S. state CPA societies
- IMA's DE&I Committee
- World Wide Generation

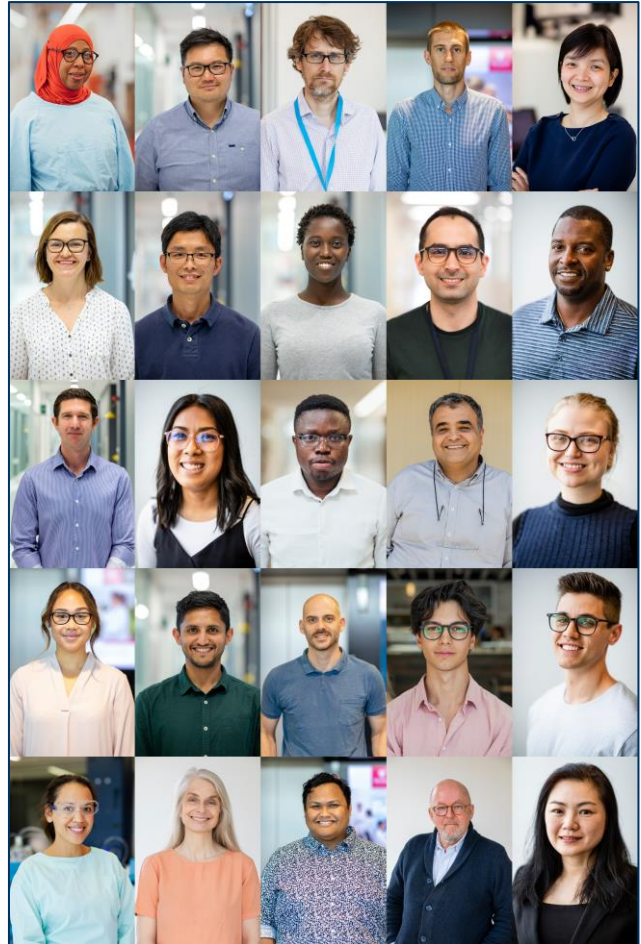
Multiple articles in *Strategic Finance* magazine by thought leaders on DE&I. Podcasts and eLearning courses are available as well.



IMA is committed to advancing the discussion around DE&I issues based on findings from our research and feedback from our members.

Diversity, Equity, and Inclusion (DE&I): International Research Co-Sponsors and Partners

Europe	
Co-Sponsor	International Federation of Accountants
Global Research Partner	American Accounting Association
Research Partner	Institute of Certified Public Accountants of Cyprus
Research Partner	Order Certified Accountants – Portugal
Research Partner	Body of Expert and Licensed Accountants of Romania
Research Partner	Union of Chamber of Certified Public Accountants Turkey



Southeast Asia	
Co-Sponsor	International Federation of Accountants
Global Research Partner	American Accounting Association
Regional Research Partner	ASEAN Federation of Accountants
Research Partner	CPA Australia
Research Partner	Ikatan Akuntan Indonesia
Research Partner	Japanese Institute of Certified Public Accountants
Research Partner	Lao Chamber of Professional Accountants and Auditors
Research Partner	Vietnam Association of Certified Public Accountants

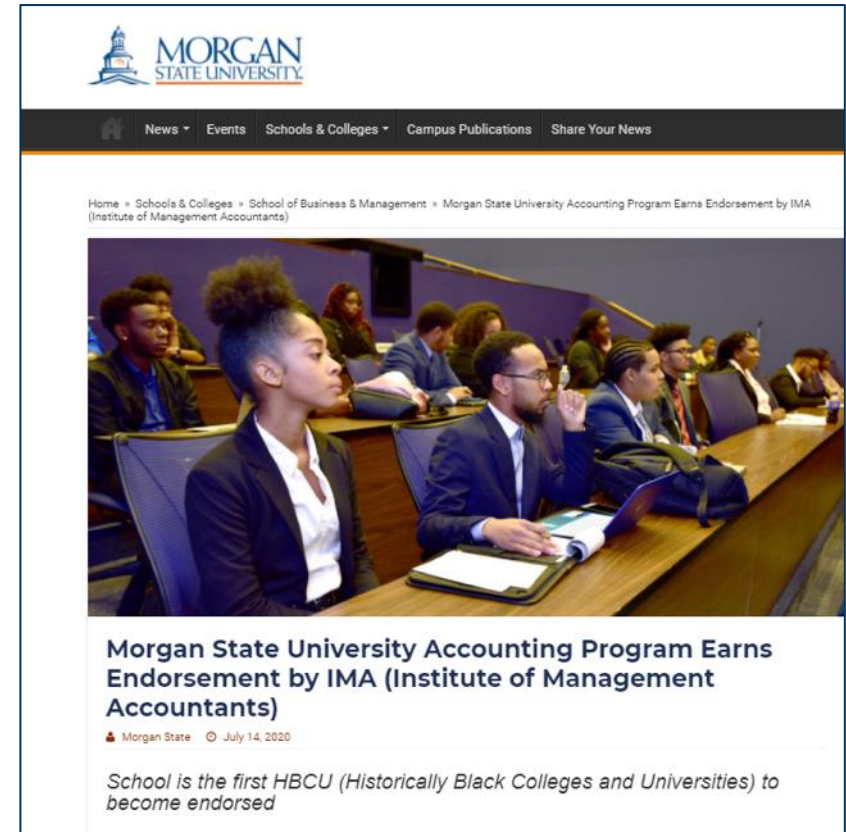
Diversity, Equity, and Inclusion (DE&I): International Research Co-Sponsors and Partners



Middle East/India	
Co-Sponsor	International Federation of Accountants
Global Research Partner	American Accounting Association
Research Partner	Iraqi Union of Accountants and Auditors
Research Partner	Jordan Institute of Management Accountants
Research Partner	Jordanian Association of Certified Accountants
Research Partner	Lebanese Association of Certified Public Accountants
Research Partner	Palestinian Association of Certified Accountants
Research Partner	Philippine Institute of Certified Public Accountants
Research Partner	Saudi Organization for Certified Public Accountants
Research Partner	UAE Accountants and Auditors Association
Research Partner	Yemeni Association of Certified Public Accountants

Diversity, Equity, and Inclusion: Historically Black Colleges and Universities Earn IMA Endorsement

- Morgan State University, Florida A&M University, and University of the District of Columbia received the endorsement of their accounting programs by IMA in fiscal year 2021.
- IMA's Endorsement of Higher Education initiative recognizes programs that meet high educational standards, enabling students to pursue and earn the CMA certification.



Sustainable Business Management: Industry-Leading Research, Thought Leadership, and Advocacy

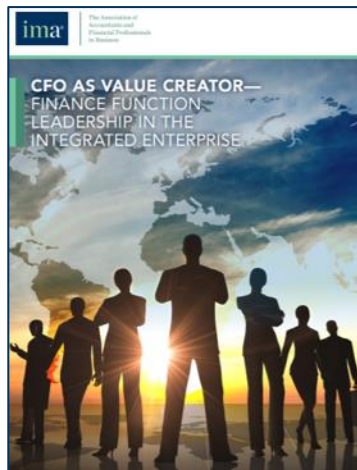
IMA's portfolio of sustainability resources are designed with the management accountant in mind.

- “CFO as Value Creator—Finance Function Leadership in the Integrated Enterprise” whitepaper and C-Suite Report, “Finance Function Partnering for the Integration of Sustainability in Business”
- Digital Transformation Brief becomes the basis for digital reporting recommendations by the European Commission

Advocacy on behalf of the management accounting profession while regulators and standard-setters, such as the SEC and IFRS Foundation, develop new structures for sustainable business reporting.



Sustainability and Value Creation eLearning course



Technology and Analytics: Industry-Leading Research and Thought Leadership

A comprehensive suite of resources on the use of technology in the profession, and agility in finance's operational delivery were produced during fiscal year 2021.

IMA's Technology Solutions and Practices Committee (TSPC) held three global webinars during the fiscal year and provided comments to COSO on technology-related topics. TSPC members also offered insight through contributed articles in *Strategic Finance*.



APRIL 26, 2021 • 18 MINUTES

Ep. 120: Jeffrey Dailey - CFO Strategist for Data and Technology

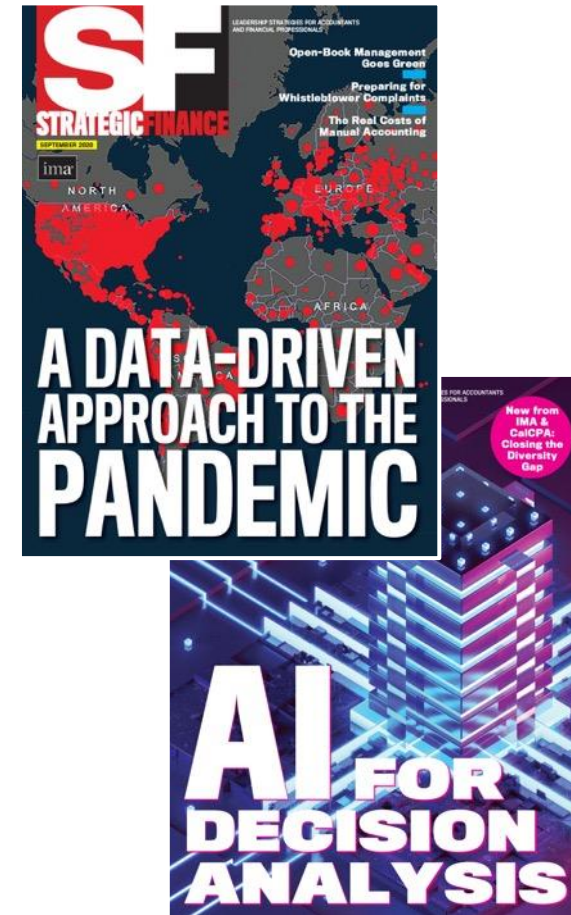
Jeffrey Dailey, Senior Vice President and Chief Financial Officer at Prometric, joins Count Me In to talk about the impact of data and technology on the role of the CFO. At Prometric, he is responsible for managerial oversight of all of Prometric's financial, legal, corporate development and risk management practices, ensuring Prometric's continued financial strength and our commitment to fund customer-focused strategic growth and innovation priorities. In his conversation with Adam, Jeff addresses some of the challenges that data presents, how to adapt to the challenges and develop a technology roadmap for the organization, and connects everything to the role of the CFO. Download and listen now!

[PLAY EPISODE](#) [DOWNLOAD \(41.3 MB\)](#)

Count Me In® podcasts



RPA eLearning course series



Growing Number of Strategic Partnerships

DE&I Partners and Contributors

Our DE&I partners and contributors share the same commitment as we do to ensuring members of underrepresented populations have the same opportunities for advancement in the management accounting profession.

Partners



**International Federation
of Accountants**



California Society of CPAs

Contributors



National Society of Black CPAs



**The Association for
Latino Professionals
for America**



NABA, INC.
NATIONAL ASSOCIATION OF
BLACK ACCOUNTANTS, INC.

**National Association
of Black Accountants**

Sustainability Contributors

Our sustainability contributors play a critical role in ensuring IMA is up-to-date on the latest developments in sustainable business information and management.

IMA considers sustainability both an ethical and financial imperative and champions the adoption of sustainability standards and measures for practitioners.

We are engaging with these organizations for the purpose of advocacy - to advance the perspective of management accountants in the new paradigms around sustainable business management and reporting.

- The Impact Management Project
- Sustainability Accounting Standards Board (SASB) and the International Integrated Reporting Council (IIRC) recently merged into the Value Reporting Foundation
- The Climate Disclosure Standards Board
- World Business Council for Sustainable Development
- The European Financial Reporting Advisory Group and the Project Task Force, both reporting to the European Commission



Other Collaborations

- IMA is a founding member of the Committee of Sponsoring Organizations of the Treadway Commission (COSO) and a member of the International Federation of Accountants (IFAC).
- This fiscal year, Deloitte's Center for Controllershship and IMA commenced a joint research project on "The Future of Controllershship."
- IMA and the Association of Chartered Certified Accountants (ACCA) jointly produce a quarterly Global Economic Conditions Survey (the largest survey of its kind canvassing CFOs), which captures sentiment around the state of the global economy.
- IMA partners with EMEA Recruitment, a specialist in international finance and accounting job placement, to offer resources and best practices in interviewing and engaging with employers.



Committee of Sponsoring Organizations of the Treadway Commission (COSO)



International Federation of Accountants

Deloitte.

Deloitte's Center for Controllershship

**EMEA
RECRUITMENT**

Think Ahead



Association of Chartered Certified Accountants

New IMA Volunteer Governance Framework to Better Reflect “The Voice of the Member”

- In fiscal year 2021, IMA implemented a new governance, planning, and implementation framework for volunteers, with the aim of better reflecting “the voice of the member.”
- This new structure enables more communication from committees to the Global Board of Directors, thereby enhancing IMA’s overall governance.
- Through a new Component Engagement Roundtable, best practices in communication, and IMA resources can be shared more efficiently between chapters and councils.

The IMA Committee structure was revised to better meet the needs of the global environment, with Regional Advisory Committees (RACs) providing direct feedback to the Global Markets Committee (GMC) to align with our strategic planning.

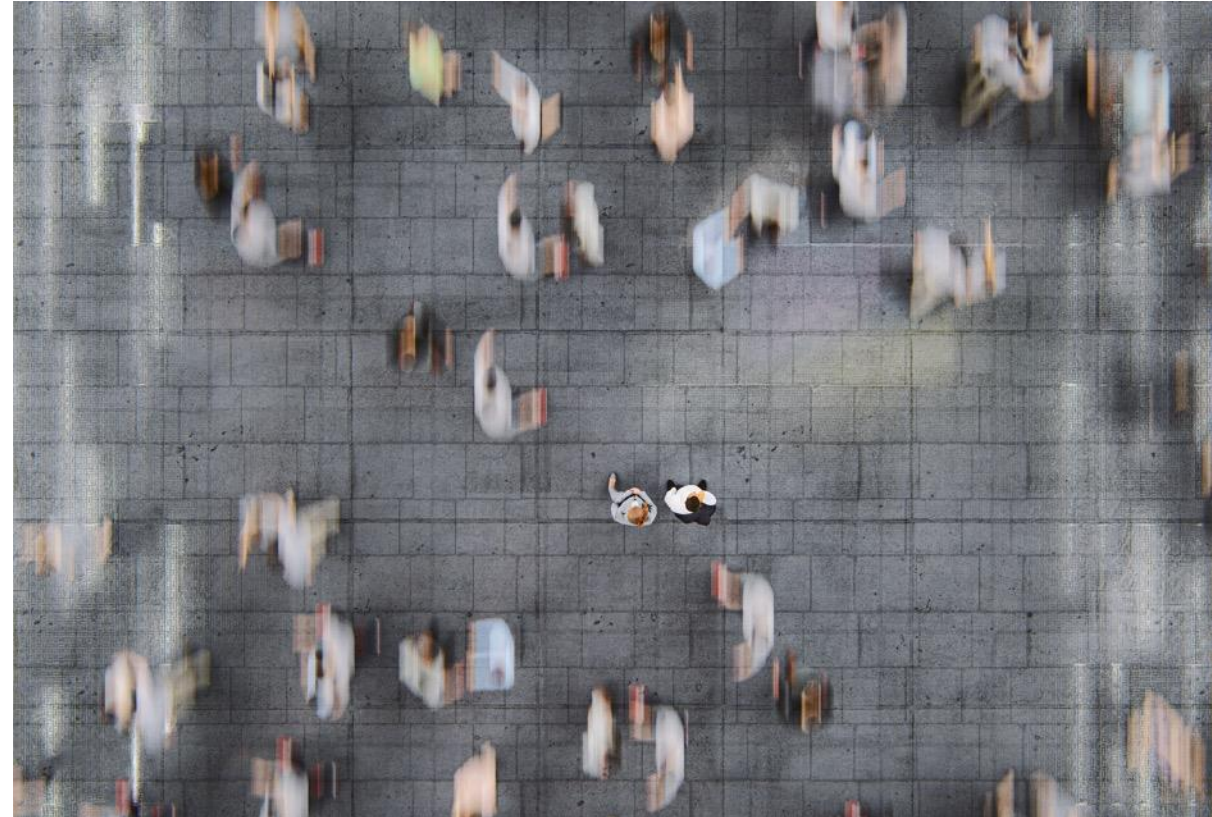


IMA Financial Reporting Committee (FRC) Relationships

Through FRC, we continue to maintain strong, direct connections with regulators and standard-setting organizations, including:

- U.S. Securities & Exchange Commission (SEC), Division of Corporation Finance, Office of the Chief Accountant
- U.S. Public Company Accounting Oversight Board (PCAOB)
- Financial Accounting Standards Board (FASB)
- International Financial Reporting Standards Foundation (IFRS)
- International Accounting Standards Board (IASB)

Some of FRC's members also sit on the FASB's Financial Accounting Standards Advisory Council and the FASB's Emerging Issues Task Force.



IMA Small Business Committee (SBC) Relationships

Through IMA's Small Business Committee (SBC), we furthered our relationship with FASB.

Some of SBC's members sit on FASB's Small Business Advisory Council.

Moreover, the SBC has a developing relationship with the SEC's Office of the Advocate for Small Business Capital Formation.

SBC collaborates with IMA Research and Thought Leadership to provide guidance on ongoing issues related to COVID. The Emerging Issues subcommittee is committed to additional focus and guidance on:

- Government support to small businesses
- Workforce shortages
- Supply chain disruptions



Teaming with the Corporate Sector



In-house CMA
Preparation Courses



CFO Roundtables



CMA Information
Sessions

Companies around the globe that support the CMA program:

Arcadis
Saudi Aramco
PingAn Insurance

Amazon India
Philips
Cargill

Freeport McMoRan
Masco Corporation
IBM

Trinity Industries
Johnson & Johnson
Baxter International


Strategic Partnership with Becker to Offer Enhanced CMA Review Experience

Becker is a global leader in certification, exam prep, and professional education. In partnership with IMA, Becker developed and implemented an enhanced CMA exam review experience with:


- New quality content
- An intuitive user experience
- Industry-leading instruction
- Personalized learning utilizing a state-of-the-art AI platform

The CMA Exam: Navigating Multiple Choice Questions


Upcoming Webinar!



Mary Patterson
Academic Outreach Manager,
IMA



Sara Reith, CMA
Manager - Capital Markets &
Investments, IBM



Amy Ford, CMA, CPA
Senior Instructor,
Western Illinois University

Tuesday, October 26, 2021
12:00 p.m. EDT

Sponsored by:
CMA **Becker+**

IMA Student Ambassadors and Campus Influencer Volunteers Connect IMA to Students

IMA's 70 active Student Ambassadors at 56 schools represent IMA on campus.

IMA Student Ambassadors demonstrate leadership and entrepreneurial skills by supporting future accounting and finance professionals as well as educating their student peers and academic faculty about IMA resources and the CMA program.

More than 300 IMA members participate in the Campus Influencers program. These members are presenting information to students about career paths in management accounting, the benefits of belonging to IMA, and the CMA certification.



Strengthening Our Relationships with Academia

- IMA welcomed a new Professor-in-Residence, Laurie Burney, Ph.D., CMA, CSCA, and Associate Professor of Accounting and holder of the J.E. Bush Professorship in Accounting at Baylor University.
- Burney liaises between IMA and university communities, helping to grow the next generation of accountants and expand the profession as a whole.
- To strengthen our connection with academia, IMA hosted a number of Faculty Fridays, one-hour educational webinars targeted to faculty to provide timely tools, tips, and best practices for teaching relevant, real-world topics in the classroom.
- We also hosted a number of virtual Academic Dinners so faculty can share how they use IMA resources in the classroom and learn how to enhance their curriculum with IMA resources.



Laurie Burney, Ph.D., CMA, CSCA
IMA's Professor-in-Residence

Recognition by Media and Industry: Expanding IMA's Reach and Influence

IMA in The Media

accountingTODAY
 AUDIT & ACCOUNTING TAX TECHNOLOGY PRACTICE MANAGEMENT MORE ▾

IMA makes new push to spotlight CMA value during tough economic times

By [Michael Cohn](#) September 16, 2020, 7:40 p.m. EDT 9 Min Read

Bloomberg Tax | Search Financial Accounting News | Advanced Search | Go | Login

Financial Accounting

Uphill Climb to Close Equity, Inclusion Gap in Accounting (1)

Feb. 16, 2021, 7:15 PM; Updated: Feb. 18, 2021, 3:23 PM

THOMSON REUTERS | TAX & ACCOUNTING | Our solutions ▾

ACCOUNTING

Pandemic May be Leading More People to Get Professional Certifications

Thomson Reuters Tax & Accounting
 October 7, 2020

Region	Number of Features*	Number of Placements*
U.S.	124	1,074
China	54	3,170
Middle East, India, and Egypt	78	476
Europe	45	207
Southeast Asia	37	1,065
TOTAL	338	5,992

*Features are any stories where IMA is prominently featured (bylines, interviews, etc.). Placements are any IMA mentions including press release pickups.

Industry Awards for the “CMA Making a Difference” Ad Campaign



GRAPHIS Gold Award
Financial Communications
Society Portfolio Gold Award



GRAPHIS Silver Award
Financial Communications
Society Portfolio Silver Award ⁴⁸

Industry Awards for *Strategic Finance*



“Govern Your Bots,” featured in the January 2020 issue of *Strategic Finance* was the recipient of two Azbee Awards.



The January 2020 issue earned an Eddie Award (for editorial excellence) in the category for association/nonprofit/professional/membership group.

Industry Award for IMA's Global Public Relations Program



IMA received the 2021 Hermes Platinum award for its global public relations program which develops creative content and strategies to reach accounting and finance professionals across the globe.



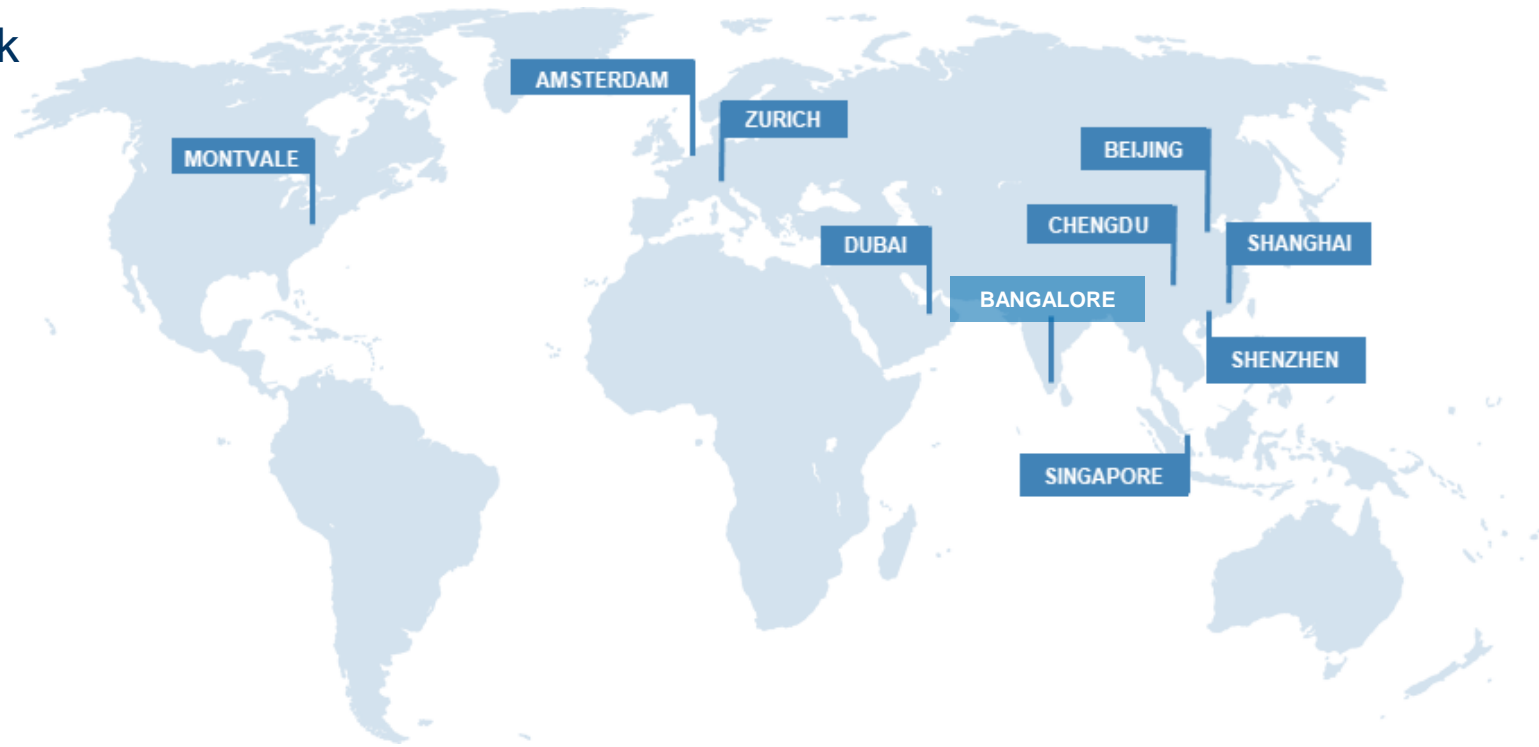
Strengthening Relationships to Build a Positive Culture

350+ Active Professional and Student Chapters and Councils in IMA's Global Regions

IMA's global reach is enhanced by the work of our chapters and councils.

IMA's global footprint includes:

- **139,000+ members** in more than **150 countries**
- **10 global offices** established or in formation
- **350+** IMA chapters, both student and professional
- **150** CMA review course providers globally



New chapters in Kochi, Kolkata, Australia, New Zealand, and Singapore

GREAT MEMBER ENGAGEMENT GLOBALLY



350+
professional
and student
chapters



500+
educational
events carried
out virtually



500,000+
educational
hours
recorded

Members of IMA's Component Engagement Roundtable Say "Thank You"



ICER created a special "thank you" video to thank chapters and councils for all their hard work during the COVID-19 pandemic.

- IMA's 300+ chapters and councils around the world bring IMA's mission of advancing the management accounting profession to life.
- They are composed of local volunteers committed to empowering IMA members in their community and beyond.
- The work of IMA's chapters and councils is so critical to the organization that IMA implemented an IMA Component Engagement Roundtable (ICER).
- ICER exists to assist chapters and councils in their work supporting and advancing management accounting knowledge in their local communities. This includes carrying out training programs and activities for local IMA members and professionals, to help build and sustain the IMA volunteer leadership pipeline into the future, through engagement opportunities.

The CMA Scholarship Offers Ways to Strengthen Careers and Confidence



“The CMA scholarship provided me with the materials necessary to prepare for and pass both parts of my CMA in less than six months! I am so grateful to have been given the opportunity to study and take the exams at no cost. Having this globally recognized certification will only boost the trajectory of my career!”

Madison Lynn works as an Engagement Financial Advisor for Deloitte. She received her BA in accounting in 2020 and her Master of Accounting (MAcc) in 2021 from Saint Leo University.



“Passing both parts of the CMA exam gave me the confidence to leverage experience with financial concepts in interviews and negotiations. It has opened up doors to careers outside of typical accounting roles and has drawn interest from top companies.”

Nick Pereira currently works as a Fund Accounting Analyst at Tesla. He graduated from Brigham Young University in 2021.

Students Solve Real-World Problems in IMA's Global Student Case Competition



IMA's Global Student Case Competition is sponsored annually to provide an opportunity for students to interpret, analyze, evaluate, synthesize, and communicate a solution to a management accounting problem.



Texas State University
Student Case Competition Winners

IMA's Century Scholarship Winner



Jarom Hyde is currently pursuing his master's degree in Accounting at the Marriott School of Business, Brigham Young University, and is the 2021 recipient of IMA's Century Scholarship.

IMA's Century Scholarship recognizes an active IMA student member who is passionate about volunteering and being a leader in the management accounting profession. Recipients receive an award of \$7,500 and a CMA scholarship.

This year's recipient, Jarom Hyde, shared the impact this scholarship has had on his career development:

“Receiving the Century Scholarship meant I did not have to work this semester. The extra time to network has helped me land my current internship!”

IMA's Lifetime Achievement Award Recipient: Captain Larry R. White, CMA, CSCA, CPA, CGFM



“IMA is a great way for you to express your passion for your professional life. My advice, ‘Get EXCITED about management accounting.’”

Captain Larry R. White at IMA's
2021 Annual Meeting of Members

Information Technology to Better Support Employees and to Better Serve Members

- Impactful strides have begun to transform IMA's website, inclusive of *Strategic Finance*, our ecommerce platform, and our member database.
- IMA is on track to produce a scalable, online personalized member/customer experience that is data driven, provides improved search, a first-class mobile experience, and has multi-language capability.
- IT continues to enable staff and members to work, attend events, and run our operations virtually.



IMA Employees Giving Back and Strengthening Member Support

Synergy Toward Achievement Team (STAT): IMA Employee Volunteerism

IMA's STAT employee volunteer team works on planning morale boosting events, charitable initiatives, and learning opportunities for IMA staff.

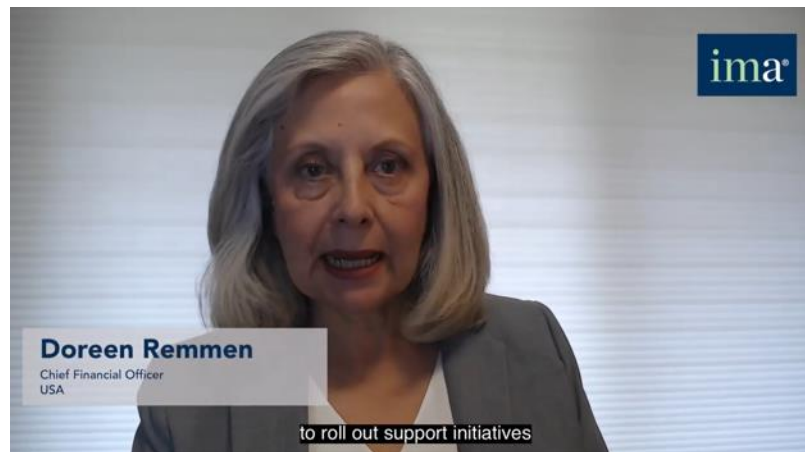
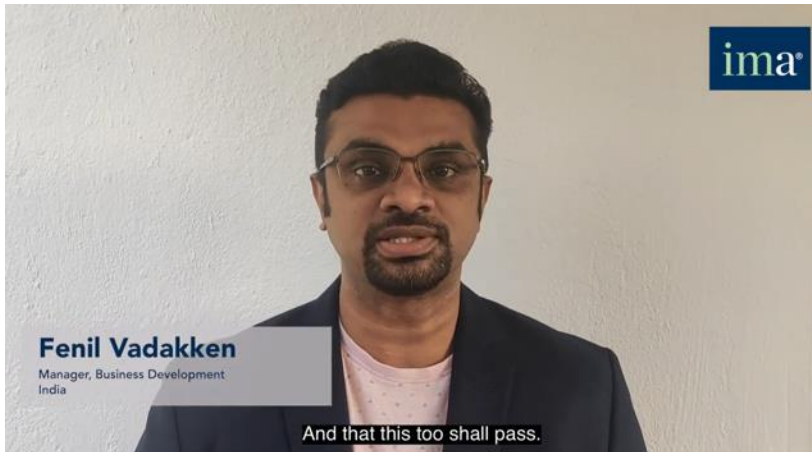
Events included:

- Celebration of Women's Equality Day on August 18, 2020
- Improving Health and Well-Being event on October 14, 2020
- Global Ethics Day discussion on October 21, 2020
- CliftonStrengths assessment for IMA employees as a follow-up to women's leadership event on May 26, 2021



In December 2020, IMA mailed gingerbread house kits to all employees and held a photo contest to pick the best house!

Tribute Video and Donation to AID India, Akshaya Patra, and St. Philomena's Hospital



In May 2021, owing to the rapidly increasing case count of COVID-19 in India, IMA organized a charitable donation to AID India, Akshaya Patra, and St. Philomena's Hospital in Bangalore, India.

IMA also created a special tribute video to acknowledge the hardship India was experiencing and to show support for all those affected.

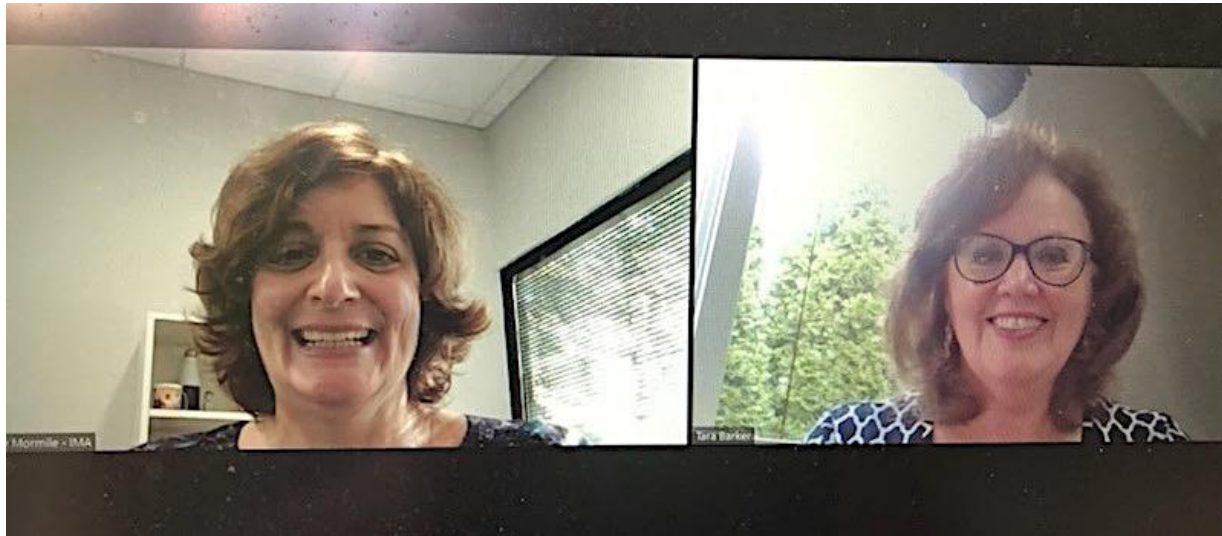
CliftonStrengths Assessment Offered to IMA Employees as Part of Women's Leadership Summit



Sandra B. Richtermeyer, Ph.D., CMA, CPA, former IMA Chair, facilitated the CliftonStrengths assessment for IMA employees as part of an IMA employee Women's Leadership Summit held via Zoom.

IMA employees were offered access to the CliftonStrengths assessment tool to aid in their personal professional development.

IMA Employee Mentoring Program



Terry Mormile, IMA's Director of Educational Initiatives and Career Services, serves as a mentor to Tara Barker, IMA's Manager of Community Relations.

IMA's Mentoring Program is now in its second year, with 15 directors and 30 staff participating in it.

The program spans every IMA region, and participants share perspectives on work-life balance, upskilling, and how to meet career development goals.

Employee STAT Virtual Halloween Contest: Having Fun While Serving Members



IMA encouraged all its employees and their families to dress up for Halloween and held a virtual Halloween photo contest on October 29, 2020.

Message from the President and CEO



Jeff Thomson, CMA, CSCA, CAE
IMA President and CEO

This past year, IMA took on the dual role of short-term risk manager and long-term strategic planner, investing in resources for members to help them through the pandemic (e.g., free online courses comprising a rich array of educational opportunities delivered virtually) while continuing to invest in the long-term success of our members.

I couldn't be more proud of the way IMA employees, volunteers, and our members demonstrated courage, agility, and resiliency in this time of great uncertainty and disruption. As organizations reconfigure themselves for a new normal that is constantly evolving, I am confident the entire IMA community will meet the multitude of challenges with courage, care, and conviction of purpose.

I especially want to thank our 364 chapters and councils, led by IMA volunteers, for offering local support to members at a time when they needed it the most. These volunteers are the lifeblood of IMA, its heart and soul, and make it possible for IMA members to network, upskill, and stay connected.

I have tremendous optimism about the future because I know our members are steering their organizations in the right direction and helping their teams adapt to the volatile and uncertain global environment that we all face.

I am proud to be your CEO and welcome your feedback.

Jeff Thomson, CMA, CSCA, CAE
IMA President and CEO



The Association of
Accountants and
Financial Professionals
in Business