CONCEPT STATEMENT

PURPOSE:

- To provide a means for enhancing the professional development of controllers of major private and public companies.

- To cultivate a regional network of controllers facing common challenges and having distinctive professional interests as a group.

- To establish closer relationships between Virginia Commonwealth University and senior executives dealing with accounting/financial issues.

- To make University resources available to members.

BENEFITS:

- Provide significant opportunities for professional development of members through interaction with peers and experts brought in to meet with the RoundTable and to act as facilitators.

- Make available to members resources from the Department of Accounting. Resources will include such items as access to library resources and databases, assistance in identifying articles and other references of interest to members, and priority treatment in identification of outstanding prospective graduates, interns and part-time employees.

- Provide 4 hours of CPE credit per meeting, for a total of 16 hours per year, for members desiring credit.

MEMBERSHIP:

Membership in the RoundTable is limited to major Companies that have annual revenues of at least 500 million dollars. Membership is by invitation and is limited to controllers (or equivalent positions) only, reflecting the commitment of the RoundTable to recognize and serve the distinctive role and responsibilities of that office. Each member may designate a substitute to attend the meetings in his/her absence. These individuals should be capable of making a worthwhile contribution to RoundTable discussions. Members may bring one guest to each RoundTable meeting. If a controller leaves office during his/her term, the successor in office succeeds to the unexpired term.
CONCEPT STATEMENT

(Continued)

MEETING FORMAT:

Each meeting will start with a presentation of about one hour on a pre-selected theme of relevance to members by a guest “facilitator” interacting with RoundTable members. This will be followed by discussions relating to the topic and subject matter presented. The facilitators will be leading national experts from business, the profession (including controllers), government, and academia. The remainder of each meeting will be a RoundTable group discussion among the members on topics of immediate interest and concern. Meetings will normally last about four hours, including breakfast and lunch.

MEETING TOPICS:

Session themes will be determined from member input by a Program Steering Committee. The Committee will consist of five RoundTable members and two representatives from the Department of Accounting as ex-officio members.

MEETING SCHEDULE AND LOCATIONS:

The RoundTable will meet four times per year for a period of approximately four hours per meeting, starting at 7:30 AM, with breakfast and lunch being served. The meetings will normally be hold once a quarter. Meetings will be held at a specified location which the Department of Accounting will arrange in consultation with the Program Steering Committee.

ORGANIZER AND ADMINISTRATOR:

The RoundTable will be organized through assistance of the Program Steering Committee and the Department of Accounting Advisory Council. The Administrator will be a member nominated by the Department of Accounting.

DUES:

Membership fee is $2,000 per year. Fees will be prorated based on the number of remaining meetings when a person joins during the year.

MID-YEAR OR YEAR-END SOCIAL:

In addition to the four meetings, there will be either a mid-year or a year-end social for members and their families.
2013-2014 MEETING TOPICS AND PRESENTERS

May 9, 2014
“Accounting System Selection and Implementation”
Dixon Hughes Goodman, LLP.
Benjamin Sady – Director
Michael Zimmerman – Director
Matthew Yarmey – Manager

“Business Process Improvement”
Dixon Hughes Goodman, LLP.
Benjamin Sady – Director
Michael Zimmerman – Director
Matthew Yarmey – Manager

“Technology Trends in Accounting & Finance”
Dixon Hughes Goodman, LLP.
Benjamin Sady – Director
Michael Zimmerman – Director
Matthew Yarmey – Manager

March 7, 2014
“Health Care Reform Update”
Towers Watson
Ann Marie Breheny – Senior Legislative Advisor
In Sung Yuh – Account Director

“The Changing Landscape of Employee Benefits and Implications of Pension Reform and Accounting”
Towers Watson
David Speier – Benefits Advisory and Compliance, Service Line Leader

December 5, 2013
“2013 Year-End Corporate Reporting Update”
Ernst & Young LLP
Michael Wasch – Senior Manager
Keith Sheehan – Senior Manager
Glenn Nunziata – Partner
Gregory Whirley – Senior Manager
Blake Manners – Partner
Timothy Winder – Partner

September 13, 2013
“Current Trends in the Mergers and Acquisitions”
PricewaterhouseCoopers
Michelle Ritchie – Director

“Leasing, IFRS, Taxes and SEC Hot Topics”
PricewaterhouseCoopers
Kenneth R. Lemelin – Partner
Sarah C. Martin – Senior Manager
Sheri Wyatt – Managing Director
Chris McGowan – Managing Director
This page is a document containing information about meeting topics and presenters for the Controllers Executive Roundtable at Virginia Commonwealth University. The document includes a list of topics and presenters for meetings held from May 10, 2013, to May 11, 2012. The document also lists the steering committee members and VCU facilitators.