



Qualified Opinion

Volume LV

March, 2005

Number 10

At a Glance: Thursday, March 17, 2005

Damon's Grill
3150 Boardwalk
Ann Arbor, MI
(east of Briarwood)

Professional Development
5:45 p.m.
\$12.00

Speaker: Tom Friegen, Goodman Venegas Insurance Agency

Topic: **Current state of the market and how to cost compare quotes**

Technical Meeting
7:00 p.m.

Cost: \$25 (includes both meetings and Dinner)

Speaker: **Jeff Sears, Johnson Controls, Inc.**

Topic: **Sarbanes-Oxley**

Menu

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Spring is Here!?

(That's what the calendar says)

Our March Speakers will help take the chill off the season...they're hot!

Our Professional Development speaker is Tom Friegen from Goodman Venegas Insurance Agency. Tom will discuss the current market and how to do competitive cost comparisons among other issues. Tom is a Graduate of New Jersey Institute of Technology with a BS in Civil Engineering.

Tom's experience includes: Fire Protection and Safety Consultant of the Protection Mutual Insurance Company, Account Executive and Sales of Protection Mutual Insurance Company (New Jersey and New York area), Managing Director of Marsh and McLennan Insurance Brokerage Detroit.

(continued on page 2.....Friegen)

Our Technical speaker in March is Jeff Sears, Financial Process Controller, Johnson Controls, Inc. Jeff will be speaking on Sarbanes Oxley.

Jeff Sears graduated from Eastern Michigan University with a Bachelors Degree in Business Administration and a Major in Accounting. He has been an Accountant for Johnson Controls for the past 24 years. During this time he has helped the Automotive Group grow from \$450 million in sales to over \$20 billion in sales.

(continued on page 2.....Sears)

President's Letter:

We're **STILL** having a Banner Year! We have jumped around from 4th place, to 2nd place, and as of the end of November, we were in 5th place nationwide. However, we had a buy month in December with no meeting due to the Holidays and a well-deserved break for all. We would have expected our ranking to slip a bit, but I guess everyone else was taking a break too, as we are back in 2nd Place! **Latest news!!!! We are still holding strong and in 3rd place as of the end of February!**

We are wrapping up our calendar year with our last three month's of speakers. With the election of our new Board we will start planning next year's events. If anyone has suggestions, now is the time to voice your opinions.

This month our dinner meeting schedule brings us two speakers with interesting subjects. We'll discuss the current market of Insurance and Sarbanes-Oxley, both important and appropriate areas of exposure that businesses and individuals need to be well versed in.

In April we'll review Environmental Regulation and Estate Planning, and May we'll discuss Inventory and Michigan State Sales taxes. As the weather turns warmer we'll plan a tour of the Jiffy factory in Chelsea and a social outing for our members to mix and mingle outside our meeting format. See you at the next meeting! Bring a friend or associate, there's **STILL** nothing good on TV on Thursday's anyway!
Sincerely,

Bill Ebright
President, IMA Ann Arbor Chapter
Email: bebright@comcast.net

(continued from page 1.....Frieigen)

His past responsibilities included Account executive for several Detroit auto manufacturers and suppliers including General Motors Worldwide Property and Financial programs and Ford Motor Company World Wide Property program. Additionally, he was the Sales Manager for the Detroit Office, and the Manager of Middle Market Department Sales and Service.

Currently Tom is the Sales Director Goodman Venegas Insurance Agency. Tom also owns and manages several businesses including car washes and coin laundries. The talk is titled "The state of the Insurance market and how to position your company to get the best advantage"

(continued from page 1.....Sears)

Jeff has held the following positions over his 24 years with Johnson Controls, Inc.:

- Accounting Trainee--Ann Arbor Corporate Office (Hoover Universal)
- General Accountant--Plastic Machinery Manchester, MI
- Cost Accountant--Plastic Machinery Manchester, MI
- Supervisor Cost Accounting -- Plastic Machinery Manchester, MI
- Plant Controller -- Coldwater, MI Plant
- Plant Controller--Linden, TN Plant
- Plant Controller -- Pulaski, TN Plant
- Financial Analyst -- Foam Business Unit
- Financial Analyst -- Ford Business Unit
- Plant Controller --Port St, MI Plant
- Tooling Controller North America--Plymouth, MI
- Plant Controller --Cottondale, AL Plant
- Financial Process Controller NA -- Plymouth, MI

Jeff has performed the following additional functions for Johnson Controls over the years: Plant Start Up, Plant Re Organization, Plant Evaluation, Centralization of Tooling Accounting, Customer Tooling Audits, Trainer for Account Reconciliations, Trainer for Balance Sheet Reviews, Sarbanes Oxley --N.A. Automotive Group Steering Committee member .

Coming Attractions:

Jiffy Plant Tour in April or May
Student Scholarship nominations and awards
Social event to be scheduled...any suggestions?
And Much, Much More.....

February Dinner Meeting Speaker Recap

By Chris Mishler

From our February meeting here is a synopsis: **Hot Topic on a cold day! February 17** when you could have learned more about identity theft. **Idet Robinson of DTE Energy**, scared us to death, then told us how to avoid that menace lurking the internet.

Idet Robinson is an Information Security Consultant currently working onsite at DTE Energy. Idet's main focus is to promote Security Awareness to DTE Energy employees. She has been instrumental in supporting the Information Security policy and procedures at DTE Energy and conducts audits to verify compliance. She has completed extensive research on electronic identify theft, and disseminates this information through various communication media.

Ms. Robinson is currently employed with Strategic Staffing Services in Detroit. She has held a variety of technical and leadership positions at DTE Energy, MSX International, and University of Michigan - Ann Arbor. She holds a Bachelors of Science Degree in Business Administration from Central Michigan University, and is currently working toward a certification in Certified Information Systems Auditor (CISA).



Idet Robinson of Strategic Staffing Services in Detroit. She also represents DTE Energy in their identity theft control program



Bradley Turnwald from Hantz Financial Services, Inc. of Ann Arbor, Michigan

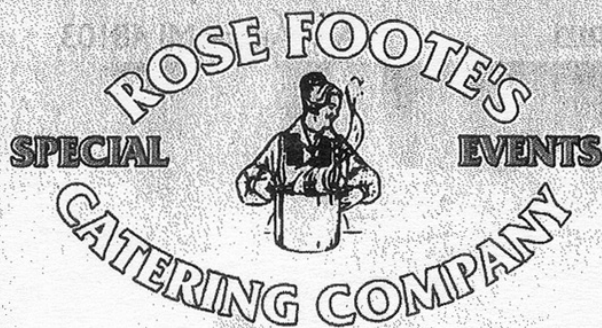
Bradley Turnwald is a registered representative in the Ann Arbor office of Hantz Financial Services, Inc., a registered broker and dealer headquartered in Southfield, MI. Brad is responsible for providing financial planning advice to clients in Southeast Michigan. Brad and his staff assist clients at Hantz Financial in coordinating their tax and estate planning concerns with investment strategies, while addressing business owner concerns. Brad works closely with Certified Public Accountants and estate planning attorneys to provide current and comprehensive advice for each client.

In addition to serving individual clients, Brad is a Seminar Specialist for the Hantz Group, the parent company of Hantz Financial and hosts financial planning presentations for various organizations in Michigan and Ohio. Brad is also a licensed property casualty agent and the manager of Hantz Agency in the Ann Arbor office. Brad attended the University of Michigan where he earned a Bachelor of Arts in Organizational Studies. Brad currently resides in Ann Arbor, Michigan.

Topics covered:

- Why are premiums increasing?
- How much liability coverage should you have?
- What should you cover?.....Motorcycle, Collectibles, Jewelry?
- Deductible Management
- What does uninsured/underinsured coverage mean to you?
- Are you properly covered in case a uninsured/underinsured motorist hits you?
- Should I have an umbrella policy?

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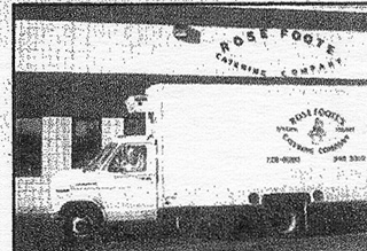
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April Newsletter Deadline

April 2, 2005

Send to Bill Ebright, Interim Editor

Fax: 734-677-0484

Email: bebright@comcast.net

Chapter Web Page Helps you Stay Current!

Go to..... <http://www.imamichigan.org/annarbor/index.html>
to keep current between newsletters. Web director Chris Mishler is
doing a superb job keeping our site updated with the latest news
and events!

Change of Address Notice

Don't forget to notify Mary Cortese at 734-397-4083 if you have any changes to your vital statistics. Keeping your information updated will help your chapter better serve you!



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