IMA Fiscal Year 2019 in Review:
100 Years and Counting

A recap of events and milestones during the year ended June 30, 2019
Message from the IMA Chair

“Serving as Chair for this organization in its 100th year of existence has been more than an honor. Pursuing a career in management accounting has been life-changing for me and to be an ambassador for this great profession has been beyond rewarding. I am continually inspired and energized by the IMA members I have met around the world and so proud to have served IMA in the capacity of Chair.”

Ginger White, CMA, CSCA
IMA Chair, Fiscal Year 2019
100th Anniversary Celebration
100 Years and Counting Highlights

- **Unprecedented growth for more investment in your future** = Significant, double-digit, volume growth (year over year) in membership (25%) and key CMA metrics such as new CMA candidates (26%), CMA exam registrations (46%), and new CMAs (89%)

- **Strong fiscal health for members’ competitive advantage** = Sustained top-line growth with innovative cost management has allowed IMA to invest in your future with a robust portfolio of products and services designed specifically for our members

- **Cutting-edge learning products to navigate your career and achieve your goals** = Technology and Analytics Center (online library of digital courses, research papers, webinars, articles, and blogs), updated CareerDriver® assessment and development tool, IMA Excel Data Analytics course, and Ethics course

- **Enhanced competencies to ensure relevance** = Enhanced Management Accounting Competency Framework and new CMA 2020 exam, reflecting the skills needed to stay relevant and succeed in today’s digital workplace

- **Value that our members and community can count on** = IMA delivers unique value through the contribution of volunteers who participate in IMA’s 300+ chapters (both student and professional) and councils, dedicated employees, and engaged members
A Year When We Reflected on the Past and Prepared for the Future
IMA 100-Year Anniversary Website

Celebrating the history of IMA through historical photo galleries, videos of today’s members, the 100-Year Anniversary book, and so much more!

www.ima100years.org

Gallery of historical photos
https://ima100years.org/stories/gallery/

Video of what IMA’s 100-Year Anniversary means to today’s members
https://youtu.be/GcO2m3c7uDU
Annual Conference in San Diego

The Association of Accountants and Financial Professionals in Business
The Golden Thread of Value

How We Achieve Our Strategic Goals

- Vision
- Mission
- Core Values
- Diversity & Inclusion Commitment
- Strategic Goals
The Enduring Values of IMA

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

<table>
<thead>
<tr>
<th>Win</th>
<th>Drive</th>
<th>Raise</th>
<th>Master</th>
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<td>Win additional market share by growing the CMA program in the U.S. and globally</td>
<td>Drive member retention and loyalty in all regions by delivering tangible value through relevant programs, products, and services</td>
<td>Raise awareness in the Student/Academic market to expand the membership pipeline and reach CMA-certified Young Professionals of tomorrow</td>
<td>Master technology that directly impacts IMA members and our value proposition</td>
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The Association of Accountants and Financial Professionals in Business
Unprecedented Growth for More Investment in Your Future
IMA’s Journey of Growth

- **Revenue ($M)**: 
  - 2009: $18M
  - 2014: $26M
  - 2019: $65M

- **Members (K)**: 
  - 2009: 58K
  - 2014: 73K
  - 2019: 139K

- **New CMA Candidates (K)**: 
  - 2009: 7K
  - 2014: 15K
  - 2019: 50K

- **Net Assets ($M)**: 
  - 2009: $6M
  - 2014: $15M
  - 2019: $31M
Registered more than 100,000 CMA exams for the year and our total number of CMA candidates is over 80,000, representing year-over-year growth of 32%.

More than 10,000 CMAs awarded, with year-over-year growth of over 89%.
IMA 2019 – A Story of Sustained Growth

IMA total membership at fiscal year-end June 30, 2019

Total student membership at fiscal year-end June 30, 2019
IMA 2019 – A Story of Sustained Growth

Active CMAs

- FY10: 17,201
- FY19: 36,350

New Candidates

- FY10: 8,448
- FY19: 49,862

Total active CMAs at fiscal year-end June 30, 2019

New candidates at fiscal year end June 30, 2019
Strong Fiscal Health for Members’ Competitive Advantage
IMA’s Membership Growth

- Five-year CAGR (Compound Annual Growth Rate) for new CMA candidates is 28% and IMA membership is 92%.

- According to Marketing General Incorporated, only 19% of the associations surveyed recorded increases of 50% or more over the same five-year period.
• Total of 139,853 members in **150 countries**
• **300+** professional and student chapters
• Membership continues to grow, expand, and diversify, and the utilization of IMA’s resources is at an all-time high.
Over 139,853 members in more than 150 countries

10 global offices established or in formation

300+ IMA chapters, both student and professional

150 CMA review course providers globally
For Our Members
Impact on Members’ Careers

- CMAs earn 57% more in median salary*
- CMAs have strengthened job security, according to 72% of members*
- CMAs are among the world’s top finance and accounting professionals

*2019 IMA Global Salary Survey
Individual Growth

- CMAs have greater potential to earn leadership positions
- CMAs can make influential decisions and interpret the numbers
CMAs Add Value in Ways Robots Cannot
Strategy Management Skills Are Key for Management Accountants

• The CSCA® (Certified in Strategy and Competitive Analysis) equips you with a forward thinking, strategic perspective to drive critical decision-making

• CSCAs are comfortable directing the strategic planning process, analyzing the environment, creating competitive advantage for their organizations, recommending, implementing, and evaluating strategies

• CSCAs demonstrate the creativity and strategic vision necessary for organization-wide transformation
CMA Media Campaign Reach in Fiscal Year 2019

The Association of Accountants and Financial Professionals in Business
Recognition of Our Global Efforts

Recognized by The Accountant/International Accounting Bulletin as the 2017 and 2018 Professional Body of the Year
Partnerships Help IMA Achieve Its Mission

The Association of Accountants and Financial Professionals in Business
Cutting-Edge Learning Products to Navigate Your Career and Achieve Your Goals
Enhanced Management Accounting Competency Framework
Technology and Analytics Center

- Webinars
- Articles
- Online Courses
- Research
IMA’s flagship publication is available in print and online every month in English and 6 times a year in Chinese. The winner of a 2019 APEX Award for Publication Excellence, Strategic Finance covers topics vital to the profession, ranging from technology and ethics to strategy and financial reporting. The special June 2019 issue celebrated 100 years of IMA’s leadership and service to the accounting profession.
IMA Research

IMA Research and Publications produces thought leadership on the most pressing issues affecting management accountants, from technology to sustainability reporting.
Supporting the Global Profession with Educational Offerings Around the World

**Continuing Education**
- 65+ IMA webinars
- 110+ partner webinars (China)
- 800+ eLearning courses
- IMA Strategy and Competitive Analysis Learning Series®
- COSO Internal Control and Enterprise Risk Management workshops and online courses

**Career Resources**
- CareerDriver® career assessment and management tool

**Global Conferences**
- IMA’s Annual Conference and Expo
- Student Leadership Conference
- China Annual Conference
- Middle East Annual Conference
- Women’s Accounting Leadership Series

**Ethics Series**
- Courses
- Workshops

**Education and Resources for the Future**
- Technology & Analytics Center
- TechTalk webinars

**Live Events**
- Over 1,000+ chapter events

**Soft Skills Development**
- Leadership Academy
Updated CareerDriver® Assessment Tool

DRIVE
IMA member benefit - log in above or join now.

ASSESS YOUR SKILLS
Take the guesswork out of career planning! Evaluate your management accounting skills and gain valuable feedback on your strengths and areas for improvement.

PLAN YOUR PATH
Build a customized development plan with the help of more than 1,000 resources, including self-study courses, webinars, publications, and on-the-job activities, to take you to the next level in your career.

SEE YOUR FUTURE
Explore your options and match your skills to 46 management accounting roles with your unique development plan as your guide.

ima®
The Association of Accountants and Financial Professionals in Business
Educational Offerings Around the World: China

- 114 eLearning courses and WeChat courses with 17,875 views!
- Continue to utilize WeChat (popular Chinese social media and mobile app) to deliver short educational courseware in the Chinese language
- China Annual Conference
Educational Offerings Around the World: Europe

• Multiple chapter events offering continuing education opportunities
• Strong engagement with members and prospects via social media
Educational Offerings Around the World: Middle East/India

- 100+ chapter events
- Proprietary research on the role of management accountants in India conducted in partnership with MyCFO
- Middle East Annual Conference
Our recent comprehensive job analysis prompted us to update the CMA exam (effective January 2020) to reflect new demands on the profession.

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<tr>
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<tr>
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<tr>
<td>Financial Planning, Performance, and Analytics</td>
<td>• Technology and Analytics</td>
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<td>• Integrated Reporting</td>
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<td><strong>Part 2</strong></td>
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Value That Our Members and Community Can Count On
Highlights from Women’s Accounting Leadership Series

Events held in New York, Boston, Amsterdam, Jordan, Saudi Arabia, and India
Fundamental to our Core Values, IMA is committed to creating and nurturing a diverse and inclusive member community, accounting and finance profession, organizational workplace, and partner network and to fostering mutual respect between individuals.

IMA embraces a culture of open-mindedness and encourages multiple perspectives to enhance our collaborative solutions, drive innovation, and create and deliver value in all that we do.
IMA Employees Teaming to Make a Difference Through Charity Events

"Red Nose Day" May 2019

"Soupa Bowl" Food Drive February 2019
Volunteer Leaders Honored at Our 2019 Annual Conference
Chapter and Council Events Around the World
Message from the President and CEO

“The unprecedented growth we have achieved this year translates directly into more investment for your future. Our members are the reason we exist, and the products and services we develop are designed for your competitive advantage. We understand the challenges of navigating a career in this digital age, but we are committed to helping you achieve your goals. When you gain relevance because you learned a new skill or expanded your career comfort zone, we have done our job. Succeeding in today’s workplace is more challenging than ever, but I want you to know IMA is behind you, ready to help in whatever way we can.”

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