

# Upskill with the CMA

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February 18, 2024



The Association of  
Accountants and  
Financial Professionals  
in Business

# Today's Presenters



**Darren Zwick**  
Strategic Partnerships Manager  
IMA  
[Darren.Zwick@imanet.org](mailto:Darren.Zwick@imanet.org)



**Morgan Del Rio**  
Marketing Director  
IMA  
[Morgan.DelRio@imanet.org](mailto:Morgan.DelRio@imanet.org)

# Panelists



**Nathan Gardner, CMA**  
Senior Accountant  
Lightsource BP



**Aaliyah Neilan, CMA, CNAP**  
Senior Accountant - Core Operations  
Pfizer

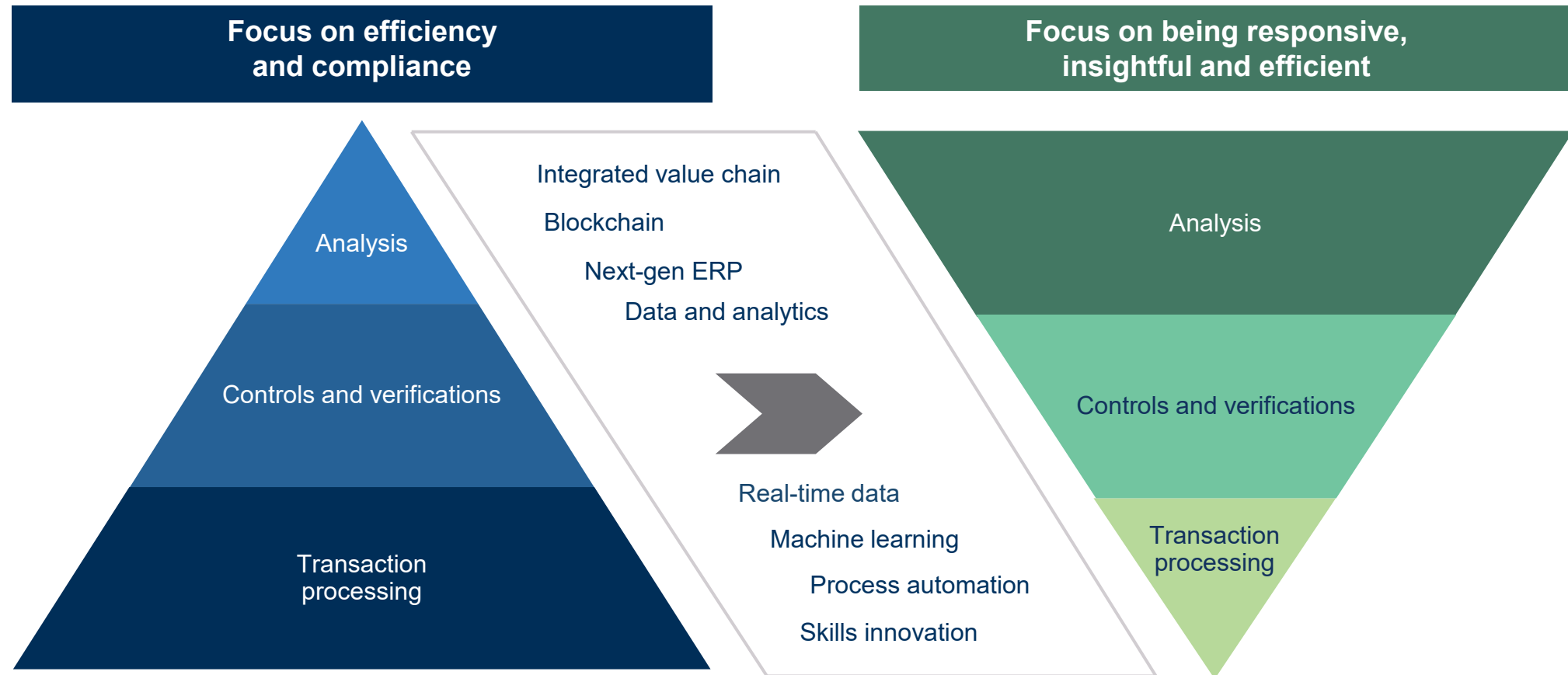


**Sarah Reith, CMA**  
Director of Finance  
IBM

# Learning Objectives

1. Describe the changing role of the modern CFO's organization.
2. Recognize the benefits of earning the CMA.
3. Explain the content and structure of the CMA exam.
4. List the steps to becoming a CMA.
5. Use CMA competencies to develop the talent in your finance organization.

# Business and Finance Transformation



# Poll Question #1

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## Where is your organization in its finance transformation journey?

- a. Just getting started, our organization resembles the pyramid
- b. We have begun implementing tools to provide analysis
- c. We are organized to provide analysis, be business partners and support decision making
- d. Not sure



# Poll Question #1 Results: (Placeholder)

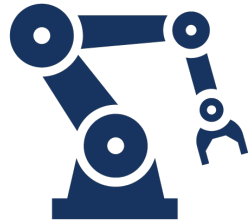
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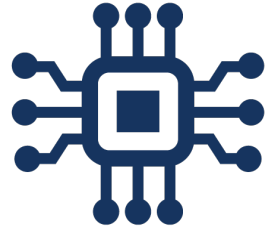
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# Getting Future Ready



**Automation is not coming. It is here now and will only increase very quickly.**



**Embrace technology as an opportunity, not just a risk.**



**Develop your skills in data analytics, synthesis and relationship management.**



**Consider The CMA!**



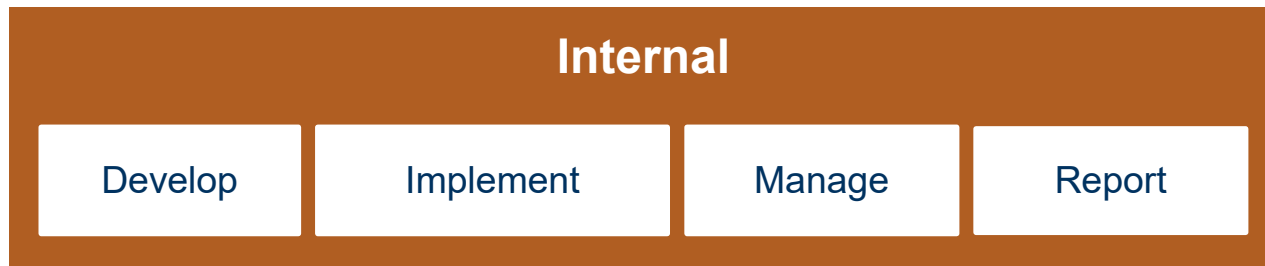
# What is a Certified Management Accountant (CMA<sup>®</sup>)?



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# Management Accounting vs. Public Accounting

## Management Accounting

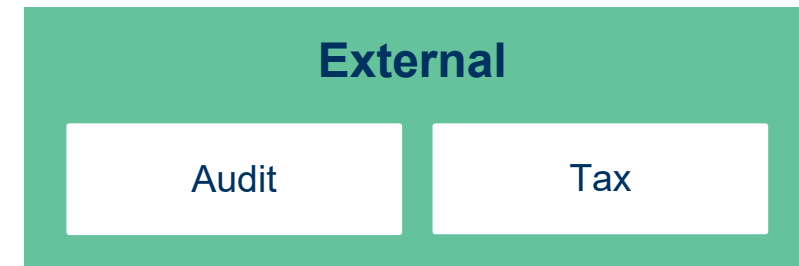


Management accountants **support the creation of value**, rather than simply measuring it.

### Relevant certification: **CMA**

- Global professional certification
- Focus on the future and on supporting strategy

## Public Accounting



Public accountants **focus on compliance**.

### Relevant certification: **CPA**

- License granted by a US state
- Focus on historical data

# It's a global passport



# The Difference is in the Numbers

**24%**  
higher compensation



CMA<sup>®</sup>s in the U.S. earn 24% more than non-certified accounting professionals.\*

\*IMA's 2023 Global Salary Survey

CMA<sup>®</sup>

ima<sup>®</sup>

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# Poll Question #2

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## Where are you in your pursuit of the CMA?

- a. I am trying to decide if the CMA credential is right for me.
- b. I know that the CMA is in my future, but I don't know how or when to start.
- c. I am currently studying for one of the CMA exams.
- d. I am a manager considering the CMA as a means to upskill my staff.



# Poll Question #2 Results: (Placeholder)

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# Steps to Becoming a CMA



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# Program Requirements



**Bachelor's degree from  
an accredited college or  
university (in any major)**



**Completion of  
2 exams**



**Two years of  
professional work  
experience**



**Active membership in  
IMA**



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# CMA Exam Structure

**Each exam part is four hours long:**

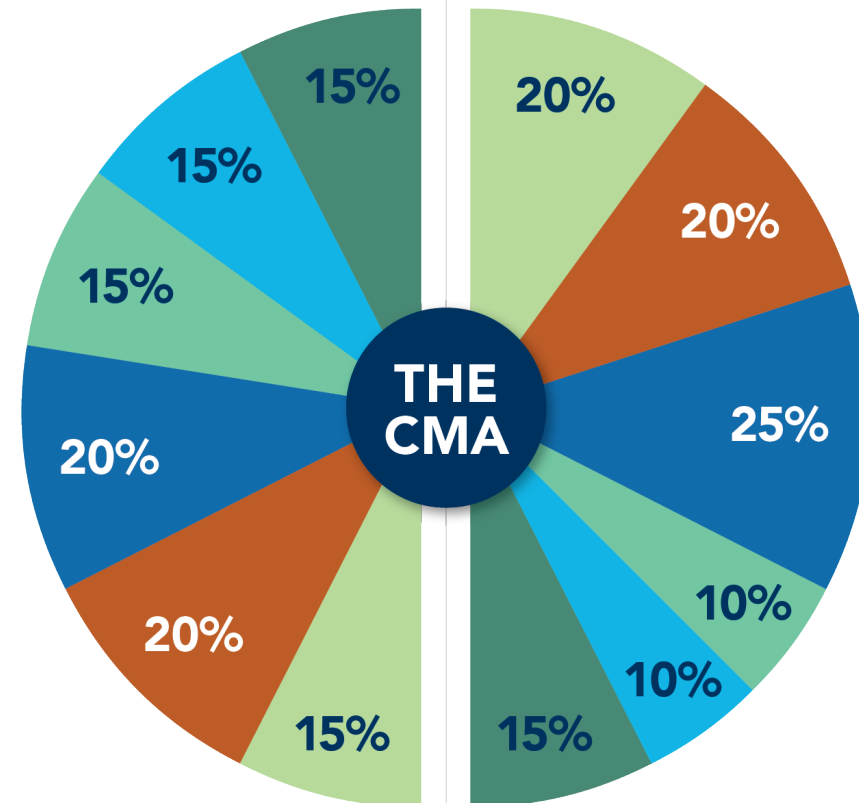
100 multiple-choice questions, followed by two 30-minute essay problems

## PART 1: Financial Planning, Performance, and Analytics

- External Financial Reporting
- Planning, Budgeting, and Forecasting
- Performance Management
- Cost Management
- Internal Controls
- Technology and Analytics

## PART 2: Strategic Financial Management

- Financial Statement Analysis
- Corporate Finance
- Decision Analysis
- Risk Management
- Investment Decisions
- Professional Ethics



# Exam Testing

**Exam administered  
at hundreds of  
Prometric computer  
testing facilities  
worldwide**

**Three exam testing  
windows offered  
each year**

January and February

May and June

September and October

**Candidates schedule  
exams at their own pace**

Part 1 and Part 2 can be  
taken in any order

On average, candidates  
complete the program within  
12-18 months



# Special Offer to Get Started

STEP 1

Hold Membership in IMA  
\$295 per year - **Discounted to \$147.50**

STEP 2

Pay the CMA Entrance Fee  
\$300 - **Discounted to \$150**

STEP 3

Register to sit for an exam part  
\$495 per part

Visit [imanet.org](https://imanet.org) and use code **50CMA** at checkout.

**BOOST YOUR CAREER**

**50** %  
**OFF**

**CMA** & **IMA**  
entrance fee & membership

**CMA**<sup>®</sup>

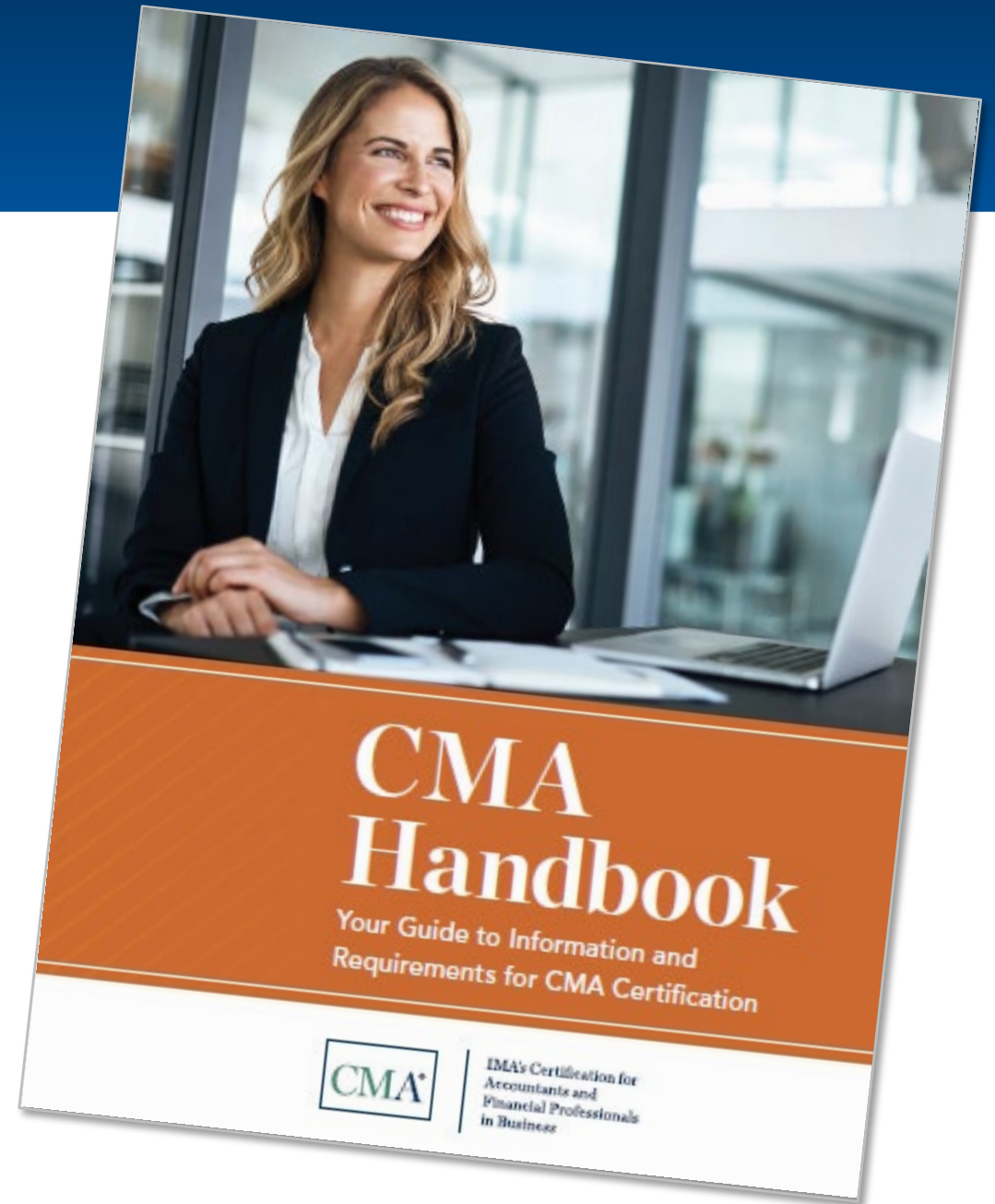
Offer ends February 28, 2025

# The CMA Handbook

An important resource for CMA candidates is the **CMA Handbook**

Find it on the IMA website:

[www.imanet.org](http://www.imanet.org) > Certifications > CMA Handbook



# Poll Question #3

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**Does your organization encourage employees to pursue professional certifications?**

- a. Yes, and I am compensated/rewarded for earning a new credential
- b. Yes, but I do not receive any financial incentives
- c. No, professional certifications are not discussed as a component of learning and development
- d. Not sure



# Poll Question #3 Results: (Placeholder)

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Director of Finance  
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# Questions & Answers



**Darren Zwick**  
Strategic Partnerships  
Manager  
IMA



**Morgan Del Rio**  
Marketing Director  
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# Thank you!

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