



The Institute of
Internal Auditors
Louisville

Derby City



Disclosures

APRIL 2024

Louisville IIA
Chapter News

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SPECIAL POINTS
OF INTEREST

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NEWSLETTER
SUBMISSIONS

The newsletter will be published monthly from September 2023 through May 2024. If you have a request for a submission please email the information to brimyers@republicbank.com and your submission will be included in the next month's issue.

MESSAGE FROM THE PRESIDENT

Hello IIA Louisville Chapter Members!

I can't believe Q1 is already over, and Spring is here. I hope everyone had a lovely St. Patrick's Day and Easter.

Last month, Andrea Higgins and Jordon Hobson of Robert Half shared the 2024 Salary Guide and their thoughts and insights into Employment and Market Trends, as well as The Demand for Skilled Talent. It was a great presentation with loads of valuable information! Thank you, Andrea and Jordan!



At this month's chapter meeting, Jodi Renn and Chris Boylan will be going over the Updated Internal Audit Standards. It's going to be an educational and entertaining presentation! We can all use this information to help prepare our audit shops for the changes that are going into effect soon.

We're also planning an 8-hour CPE event to be held on Tuesday, May 14th. This will be a multi-topic seminar where we'll have a variety of speakers throughout the day. More information will be released in our next newsletter, as well as email announcements.

Speaking of email announcements, our Chapter Email has been updated. Please be sure to add our new Chapter Email (chapter17@iiachaptercommunications.org) to your contacts so the messages make it to your inbox.

As always, if you or someone you know is interested in volunteering with our chapter, please reach out to any of our Officers and we will be happy to help.

Thank you,

Lesley Clark
President, Louisville IIA 2023-2024

CAP UPDATE

As you know, our Chapter has a goal to meet the requirements for Gold status each year. Below is a list of some of the things your Chapter leadership is doing to ensure we meet that goal.

- Deliver a minimum of eight (8) quality CPE hours to membership
- Offer chapter seminars
- Promote IIA certifications to achieve 2% certification growth
- Grow membership by 2%
- Highlight milestone member anniversaries in the newsletter
- Recruit CAEs to the IIA
- Recognize newly certified members and provide framing for newly earned CIA certificates
- Hold events within the Chapter & members within their organizations to celebrate IIA awareness month in May

LUNCH MENU

The in-person monthly meeting includes your choice of one Panera lunch box selection, including sides and dessert option:

Lunch Boxes

- Smokehouse BBQ Chicken Sandwich
- Roasted Turkey & Avocado BLT Sandwich
- Bacon Turkey Bravo Sandwich
- Napa Almond Chicken Salad Sandwich
- Tuna Salad Sandwich
- Deli Turkey Sandwich
- Green Goddess Cobb Salad (No Meat)
- Green Goddess Cobb Salad with Chicken
- Caesar Salad
- Caesar Salad with Chicken
- Fuji Apple Salad
- Fuji Apple Salad with Chicken
- Greek Salad
- Greek Salad with Chicken

Sides

- Chips
- Baguette
- Apple

Dessert

- Cookie

Note that there will also be soft drinks and water available on-site.

APRIL MONTHLY MEETING — HYBRID

Date: Tuesday, April 9th, 2024
Meeting Time: 12:00 p.m. - 1:00 p.m. (Eastern Standard Time)
Presenter(s): Jodi Renn & Chris Boylan
CPE credits: 1 hour
Cost:
 Member Virtual Price: \$15
 Member In-Person Price: \$25
 Non-Member Virtual Price: \$20
 Non-Member In-Person Price: \$30
 Student Virtual Price: \$Free
 Student In-Person Price: \$10
Location: Virtual — Register below to receive call-in details
 In-Person @ Dean Dorton (ShelbyHurst Campus)
 435 N Whittington Pkwy Suite 400, Louisville, KY 40222
Registration: [Here](#)

PRESENTATION SUMMARY

Topic: Updating the Classics: A Humorous Yet Professional Guide to the Recent Changes in Internal Audit Standards

Description: Professional standards in internal audit are essential for maintaining integrity, consistency, and reliability in the audit process. They serve as a foundation for ethical conduct, ensure the protection of stakeholder interests, and promote continuous improvement in the field, ultimately contributing to the overall success and credibility of the internal audit function. Recent changes to the standards will go into effect in January 2025. In this session, you will hear about the most significant changes and how you can begin to prepare for a smooth transition.

Please **register for this session by Monday April 8th.**

PRESENTER PROFILE



Jodi Renn—Jodi has over 30 years of experience, four years in public accounting, and over 25 years as the head of internal audit departments. She is an expert in supporting businesses to achieve objectives through a systematic review of processes that leads to enhanced compliance and increased efficiencies. Notable achievements include establishing an enterprise-wide risk management system to break down silos and create broader conversation; and increasing efficiencies and enhancing accuracy of recording Trustee bond transactions, reducing a two-day process to a few hours, and opening opportunities for other value-added tasks.

She has led cross-functional teams and served as a trusted advisor to embed Internal Audit, break down silos, and make constructive recommendations for change. Jodi has been instrumental in utilizing sound business judgment and in-depth understanding of the control environment to eliminate inefficiencies and release time for value-added activity. She takes a future-focused approach to leadership, promoting succession planning to provide a platform for growth. Jodi is a mission-oriented, strategic thinker who is passionate about supporting organizations achieve their objectives. She works to identify barriers and create streamlined processes to assist people in accomplishing their assignments more efficiently.



Chris Boylan—Chris has more than 20 years of experience in audit, accounting, and finance positions in various industries. He has operated as the Director of Internal Audit for a large academic medical center and headed up corporate finance as a Chief Financial Officer, providing him with a unique understanding of the important link between risk management and business operational success. As an Internal Audit Manager at Dean Dorton, Chris works with both private and publicly traded companies providing a variety of internal audit related services, including SOX Section 404 internal controls assessments, J-SOX internal controls assessments, outsourced internal audit, co-sourced internal audit, risk management education, compliance assessments, and policy and procedure review. Chris has extensive experience providing internal audit, compliance, and business consulting services for a variety of industries including healthcare, manufacturing, energy, mining, construction, higher education, and school districts. He has participated on healthcare industry focus groups and was selected to present as an internal audit expert on a panel at the Healthcare Compliance Association’s national conference. Chris has made presentations to organizational governance boards and management to educate them on the important role internal audit plays in an organization and has aided in establishing internal audit functions.

SAVE THE DATE!! MAY FULL-DAY SEMINAR — HYBRID

Date:	Tuesday, May 14th, 2024		
Meeting Time:	8:00 a.m. - 4:30 p.m. (Eastern Standard Time) Networking and breakfast at 7:30am		
Presenter(s):	Gui Cozzi, Kevin Cornwell, Mike Reinhart, Dr. K. Chris Cox and Dr. Brooke Stewart		
CPE credits:	8 hours		
Cost:	Member Virtual Price:	\$125	
	Member In-Person Price:	\$150	
	Non-Member Virtual Price:	\$150	
	Non-Member In-Person Price:	\$175	
	Student Virtual Price:	\$Free	
	Student In-Person Price:	\$50	
Location:	Virtual — Register below to receive call-in details		
	In-Person @ Dean Dorton (ShelbyHurst Campus) 435 N Whittington Pkwy Suite 400, Louisville, KY 40222		
Registration:	Here		

PRESENTATION SUMMARY

IIA Louisville is excited to present the lineup for our May 2024 seminar on Tuesday, May 14. The seminar will be eligible for 8 hours of CPE including 2 hours of ethics CPE! We will begin promptly at 8:00 AM with networking and a light breakfast starting at 7:30 AM. We will be in the Dean Dorton Training Room at 435 N Whittington Pkwy, Ste 400, Louisville, KY 40222. Lunch is included.

Gui Cozzi and **Kevin Cornwell** will present **Cyber Strategy and IT Risk Assessment** starting at 8:00 AM. Gui will discuss the importance of having a strategy to quickly detect, mitigate and remediate a cyber-attack, the premise being it is not “if” but “when”, therefore the strategy should be how to best mitigate as fast as possible. Then Kevin Cornwell will discuss on the importance of an IT Risk Assessment and identifying the right IT framework to best set you up to quickly detect, mitigate, and remediate.

Michael (Mike) Reinhart, CPA will present the **Ethical Effects of AI on the Accounting Profession** starting at 10:00 AM. His presentation will include an Overview of current AI uses/prevalence in industry, a Cost Benefit Analysis via Pros and Cons, Direct and Indirect impacts, Ethical dilemmas with AI utilization, Accounting usage, Applying the fraud triangle to AI, Internal Control Design, and Auditing Procedures for AI.

Dr. K. Chris Cox presenting **Negotiation** starting at 12:30 PM (Additional details to come in May newsletter).

Dr. Brooke Stewart will end our day starting at 2:30 PM on **Beyond Burnout: How to Reset Your System, Manage the Stress Response and Find Balance in the Workplace**. You will learn how to:

- Reset your system in the blink of an eye
- Move through distress and rework feelings such as overwhelm and burn out
- Tap into untapped reservoirs of energy
- Utilize the power of mindfulness, meditation and journaling
- Support the system through mindset, diet, lifestyle and supplementation
- Tune in, connect and return to the present moment so that you can in turn, make choices that are in alignment with your health, desires and growth trajectory



NEW INSTAGRAM PAGE

Sharing exciting news! We have a new Instagram account to be used to post pictures, videos, announcements, etc. Also, we created it to help increase knowledge about what IA is with the goal of better engagement and increase membership to our chapter. Here is a link below: [IIA Louisville Chapter \(@iialouisville\) • Instagram photos and videos](#)

As you all have any information, photos, etc., please send to [London](#) and [Myhanh](#) so they can post all the exciting things we are doing. Some ideas can be pictures of members and/or students receiving certification, students receiving scholarships, volunteer work we are doing, social events, etc.

CAE ROUNDTABLE

Calling all CAEs and Audit Shop Leaders—reach out to [Shawn Stevison](#) to connect regarding resumption of the CAE Leader

IIA ACADEMIC RELATIONS

Student Memberships

FREE IIA Student Memberships!

Students can register [HERE](#) for a Free Student Membership, then choose the Louisville Chapter once enrolled. Please continue to encourage your Interns and junior associates to join our IIA Chapter. IIA Student Memberships are now free of charge for any student enrolled in a minimum of 6 credit hours.

Student Membership Benefit

For the April meeting, students will have the opportunity to attend for the discount price of \$10 if they choose to attend in person and **FREE** if they choose to attend virtually.

Academic Relations Volunteer Opportunities

Occasionally, we may reach out directly to our members to ask for volunteers to participate in various student events. Please consider participating in student events for any of our local Universities. [Zack Estes](#) is working with local Colleges and Universities to arrange for guest speakers. Please reach out to Zack if you would be interested in getting involved with these schools.

Internships

If your company has an open internship position, please share the following with your HR/ Recruiting departments. The Universities require that internships be posted to their respective Career Services sites to satisfy their Equal Opportunity requirements. Handshake and Cardinal Careers are the sites used by the schools. Here's the link for [Cardinal Careers Employer Registration](#), which is used by UofL's School of Business. Here's the link for [Handshake](#), which is used by both Bellarmine and IUS. Please forward any open internship postings to [Zack Estes](#). We can help spread the word further about your internship by reaching out to faculty at the local universities.

Certification News

Congratulations to **Ariana Campbell** on earning the CIA Designation!!!

New Members & Anniversaries

New Members

Minghong Ciecorka
Mikhail Heaven
Ryan Dawson
Sydney Brooks
Parker Hobbs
Will Mattingly
Ron Topper
Robbie Chitwood

MEMBER ANNIVERSARY

15 Years

Rebecca Lair

35 Years

Connie Ann Davis

LOCAL IIA NEWS

CIA Challenge Exam

Take the next step and apply for the CIA Challenge Exam in **April**. Mark your calendar and don't miss the chance to enhance your internal audit credibility by adding CIA to your credentials.

Active CISA holders can earn the Certified Internal Auditor® (CIA®) designation through an expedited process. The CIA Challenge Exam is your way to expedite obtaining the CIA designation by successfully passing this one-part examination.

The CIA Challenge Exam only includes content not covered on your CISA exam, saving you time and money.

Program Timeline

- Application window: April - September
- First Attempt Testing Windows: June, August, November, or February
- Once your application is approved, please note you have 180 days to register, schedule, and sit for the exam.

Visit the [CIA Challenge Exam](#) page to learn more about this opportunity.

CIA Exam Prep Resources

CIA Practice Questions allow candidates to practice their skills and knowledge with retired questions from previous CIA exams. Visit the [website](#) for more information and pricing!

The IIA's CIA Learning System is offering 10 free practice questions and 30 free flash cards so candidates can see how comprehensive and effective the program is! Visit [learnCIA.com](#) to try the free resources and access other CIA study and exam tips.

QUALITY ASSURANCE REVIEWS

If you are qualified to perform QARs, please reach out to [Ann Bauer](#).

OFFICERS AND COMMITTEE CHAIRPERSONS

PRESIDENT AND NOMINATING COMMITTEE CHAIR

Lesley Clark
Federal Reserve Bank of St. Louis

VICE PRESIDENT & PROGRAM CHAIR

Myhanh Pham
Synchrony

CHAPTER ACHIEVEMENT PROGRAM (CAP) CHAIR

Jenni Schelling
Louisville Water Company

TREASURER

Marcie Smitha
Park Community Credit Union

SECRETARY

Robert Stutsman
Credit First National Association (CFNA)

MEMBERSHIP CHAIR

Catie Knable
Caesars Entertainment

ACADEMIC RELATIONS

Zack Estes
Republic Bank & Trust Company

ADVOCACY/DIVERSITY

London Lopez
Humana, Inc.

Myhanh Pham
Synchrony

AUDIT CHAIR

Brittany Myers
Republic Bank & Trust Company

CERTIFICATIONS CHAIR

Bob Aemmer
LG&E and KU Energy

CHIEF AUDIT EXECUTIVE (CAE)

ROUNDTABLE CHAIR

Shawn Stevison
Humana, Inc.

GOVERNMENT RELATIONS CHAIR

May Porter
JCPS

JUNIOR ACHIEVEMENT CHAIR

Andrea Higgins
Robert Half Management Resources

NEWSLETTER CHAIR

Brittany Myers
Republic Bank & Trust Company

SEMINAR CHAIR

Sonja Heath
Humana, Inc.

QUALITY ASSESSMENT REVIEW CHAIR

Ann Bauer
Republic Bank & Trust Company

SOCIAL ACTIVITIES CHAIR

Andrea Higgins
Robert Half Management Resources

WEBMASTER

Sonja Heath
Humana, Inc.

SOCIAL MEDIA

London Lopez
Humana, Inc.

BOARD OF GOVERNORS

ELECTED MEMBER TERMS

Chris Elmore (Thru 5/31/2024)
Churchill Downs

London Lopez (Thru 5/31/2024)
Humana, Inc.

Ariana Campbell (Thru 5/31/2025)
Fannie Mae

Zack Estes (Thru 5/31/2025)
Republic Bank & Trust Company

May Porter (Thru 5/31/2025)
JCPS

PAST PRESIDENTS TERMS

Catie Knable (Thru 5/31/2024)
Caesars Entertainment

Shawn Stevison
Humana, Inc. (Thru 5/31/2025)

ADVERTISEMENT POLICY

Area employers are eligible for free recruitment postings on the Louisville IIA website and in the monthly newsletter, IE at least one employee is a member of the local chapter. Newsletter advertisement rates for employers without a local chapter member and executive search firms are: **\$50 – ½ page; \$100 – full page**. Paid advertisements also include posting of recruitment information on the chapter website for one month. Payments must be received prior to posting. For more information, please email the Louisville IIA Chapter President or Secretary.



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