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Members/Friends,

As another chapter year comes to a close, I find myself reflecting on the significance of networking. The 22/23 year marked a period of transitioning back to in-person events enabling us the chance to foster genuine connections and personally benefiting from the invaluable experiences they offered.

First and foremost, I would like to express my heartfelt gratitude to everyone who actively participated in these in-person networking opportunities. Your presence and engagement have played a pivotal role in expanding our professional networks, creating opportunities for growth, and fostering a sense of community. Each and every one of you has contributed to the success of our local chapter, and for that, I am sincerely thankful.

As we embark on a new year, I am filled with excitement as I envision the continued growth, networking, and career advancement of our chapter officers, volunteers, and members. Through the networking events and comprehensive CPE offerings that the Chattanooga Area Chapter will consistently provide, I am confident that our stakeholders, shareholders, and employees from various companies will benefit immensely, experiencing enhanced controls, improved ethical behavior and operational efficiency.

Sincerely,

Rob Zunt, CPA, CISA, CIA, CFE, CRMA
President | Chattanooga Area Chapter
Chapter Membership

Membership by the Numbers*

- Total Members: 119
- Certified Members: 39
- New Members: 20
- Chapter Officers: 4
- Board of Governors: 6

*as of June 29, 2023
Chapter Achievement Program

Gold Chapter Status for 25+ Years!

The Chapter Achievement Program (CAP) is a recognition program for chapters that align with the North American Strategic Plan in four primary service categories – Programming, Certifications, Advocacy, and Membership. Each North American Chapter works to achieve one of three performance levels – Bronze, Silver, or Gold.

Each year, our chapter officers diligently work to achieve gold status through planning activities, monitoring progress, and providing all necessary reporting.

For the 2022-2023 year, we completed all requirements to achieve gold status. Currently, we have been awarded Sapphire status for achieving gold status for over 25 consecutive years. The Chattanooga Area Chapter is in the process of submitting all necessary documents for the 2022-2023 Chapter Achievement Program.
The Chattanooga Area IIA Chapter is committed to increasing awareness within and educating the next generation of Internal Auditors. To aid in that mission, the Academic Relations Committee partners with local universities and colleges. Student members also receive copies of the newsletter and free access to events.

This year, our chapter was able to present for classes at the University of Tennessee at Chattanooga and Lee University.

**Student Members**

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**Events**

- 11/08/22 – Pasta with Professionals
- 03/28/23 - Beta Alpha Psi Presentation
- 09/08/22 – Career Fair
- 11/14/22 – Mock Interviews & Two Class Presentations
- 02/28/23 - Business Etiquette Dinner
Chapter Events

Analytics & Organizational Value
• Kenny Schneider, CPA, CIA, CISA
• Partnership with Nashville Chapter
• 1 hour (virtual)

TN State Specific Ethics
• Dr. Perry Moore
• Partnership with East TN Chapter
• 2 hours (virtual)

Incorporating Consulting... & Communicating Effectively
• Jami Shine, CIA, CRMA, CISA, CRISC
• Partnership with East TN Chapter
• 2 hours (virtual)

End of Year Networking and Last-Minute CPE (ESG & Root Cause Analysis)
• Rob Zunt CPA, CISA, CIA, CFE, CRMA
• Bambi Gifford, CPA, CIA
• 2 hours (in-person)

Social Media Risk Management
• Alex Cooze
• 2 hours (hybrid)

Mystery Fraud Event
• Tim Hungerford, CPA, CIA, CISA, CMA, CFE
• 4 hours (in-person)

Provided 13 hours of Continuing Education (8 in-person)
Mystery Fraud Event 2023
Financial Update

Utilizing Surplus to Focus on Members

Our chapter establishes an annual financial plan to support our mission in a responsible, effective, and sustainable manner. We entered this year in a strong financial position due to our stewardship in prior years. This allowed us to subsidize speakers with existing funds and provide quality CPE to members at a low or no cost.

The Chattanooga Area Chapter receives a member allotment from the national organization, which covered 13% of our event expenses for the year. The remainder is funded exclusively by our event registration fees. We ended the fiscal year with a deficit of $2,600, which was expected due to the decisions to invest in members. As of year-end, the chapter funds are sufficient to cover approximately 2.28 years' worth of operating expenses if needed.

Expenses by Category

- Events: 40%
- Leadership Academy & District Workshop: 42%
- Academic Relations: 6%
- Other Expenses: 11%
Leadership in Action
Chapter Officers

President
Rob Zunt, CPA, CISA, CIA, CFE, CRMA

Vice President
Bambi Gifford, CPA, CIA

Treasurer
Amanda Conner, CPA

Secretary
Amaya Beck
Board of Governors & Audit Committee

Kim Clingan
Lisa Culver
Dennis Cunningham
Karen Templeton
Amanda Thacker
Richard Walls
Ashley Lewis
Jennifer Benefield
Peyton Webster (student)
Thank you to all of our members, officers, board members and volunteers for making 2022-2023 a successful year for the Chattanooga Chapter!