



Working Hand in Hand for a Better Future

携手同行，共创未来

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The Association of
Accountants and
Financial Professionals
in Business

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What we will talk about today

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IMA's Origins and Societal Purpose /
Commitment in China
IMA的起源和承诺

IMA's origins and global reach

IMA协会的起源及全球发展

- Founded in 1919, IMA is the worldwide association of accountants and financial professionals in business, providing global resource for developing, certifying, connecting and supporting the world's best accountants and financial professionals.
- IMA is truly global, with students and professionals in 150 countries supported by 10 staff offices around the world, including 4 offices in China employing 40 Chinese nationals.
- The mission of IMA is to provide a forum for research, practice development, education, knowledge sharing, and the advocacy of the highest ethical and best business practices in management accounting and business finance.



- IMA成立于1919年，是全球性的会计师和财务专业人士的专业组织，依托全球资源平台，致力于培养、认证、联系及支持顶尖会计和财务专业人士。
- IMA是一家全球性组织，为150多个国家的学生和在职人士提供专业支持；IMA在全球共设10个办事处，其中在中国设立4个办公室，拥有40名中国员工。
- IMA的使命在于为学术研究、实践发展、教育和知识共享提供平台，并在管理会计和商业财务领域倡导最高道德标准，创造最佳商业实践。

IMA's origins and global reach

IMA协会的起源及全球发展

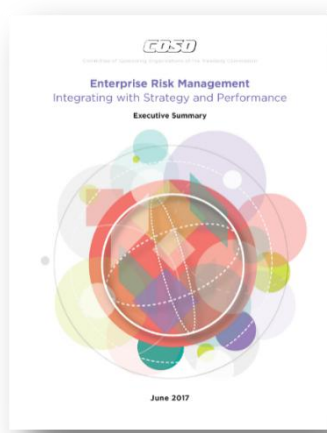
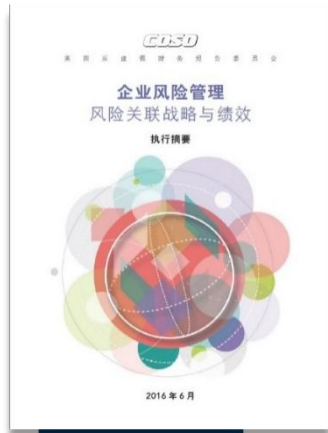
- IMA has relationships with hundreds of universities and corporations in advancing the profession of management accounting, enabled by a research-granting non-profit foundation, student leadership and scholarship programs, thought leadership, and professional competency frameworks.
- IMA has a long track record of commitment and education in the areas of corporate governance and ethical professional behavior.
- IMA通过与数百所大学和企业共同协作，设立研究基金会，创建学生领导力和奖学金项目、思想领导力项目，开发专业能力素质框架，借此促进管理会计的发展。
- IMA长期致力于通过教育帮助组织提升公司治理水平并确保财会专业人士秉承职业道德操守。



IMA as founding member of COSO

IMA协会作为COSO创始成员

- IMA as a founding member of COSO, is dedicated to provide thought leadership through the development of frameworks and guidance.
- IMA 作为COSO创始成员，致力于通过框架和指引助力思想领导力提升。
- China's Ministry of Finance incorporated COSO ICIF (Internal Control-Integrated Framework) into its standards in 2006.
- 中国财政部于2006年将COSO内部控制-整合框架纳入其标准体系。
- Jeff Thomson, President and CEO of IMA, who is also COSO board member, has been conducting many COSO speeches and workshops in internal controls, risk management, and corporate governance.
- IMA总裁兼CEO Jeff Thomson先生，同时也是COSO董事会董事，持续就内控、危机管理和公司治理多次发表COSO演讲并举办研讨会。



2017 Leveraging the
COSO Internal Control
– Integrated Framework
to Improve Confidence
in Sustainability
Performance Data
利用COSO内部控制综合框
架，提高对可持续性绩效数
据的信心

ima®

2017 COSO ERM (Enterprise
Risk Management)
企业风险管理

2013 Internal Control –
Integrated Framework
内部控制-综合框架

IMA is a respected member of global associations to advance the profession

IMA协会作为全球其它专业组织的成员，共同推动行业发展

- IMA is an active, voting member of the International Federation of Accountants (IFAC).
- IMA是国际会计师联合会（IFAC）的成员，对重大事项享有投票权。



- IIRC recently merged into a new Value Reporting Foundation, now working with the International Sustainability Standards Board to create a globally consistent set of sustainability standards for value creation
- 国际综合报告理事会（IIRC）最近与一个新的价值报告基金会合并，现在与国际可持续发展标准委员会合作，为价值创造制定一套全球一致的可持续发展标准

INTEGRATED REPORTING <IR>



Journey in Advancing Management
Accounting in China
IMA在中国推进管理会计的历程

IMA's journey in China

IMA中国大事记

2006

In May, in answer to an invitation from the Ministry of Commerce, IMA conducted a research on costing practice and published "Managerial Accounting in China".

2007

IMA begins offering the CMA exam in Simplified Chinese, embarking on a journey to create a nearly 100% bilingual user experience for Chinese society covering the exam, learning process, website, service, educational programs, and more.

2008

In November, IMA co-creates the Managerial Accounting Research Institute with Central University of Finance and Economics.

2011

In November, IMA organizes the first China Managerial Accounting International Talent Conference with State Administration of Foreign Experts Affairs and SASAC.

2010

- In March, SASAC recommends the CMA in its system. Financial staffs in central enterprises participate in the training actively.
- In December, IMA, along with Haier and University of International Business and Economics, establish the Managerial Accounting Research Centre.

2009

- In April, IMA kicks off the first Case Competition.
- In November, after signing the agreement with State Administration of Foreign Experts Affairs, IMA brings the CMA to China.

IMA's journey in China

IMA中国大事记

2012

- In April, IMA publishes IMA Education Cases.
- In May, IMA proposes May 6 as the Management Accounting Day.
- Published SMA in 2012

2013

- In May, the first IMA Managerial Accounting Academic Forum is held in Beijing.
- In September, the delegation of SASAC (State-owned Assets Supervision and Administration Commission) visits IMA headquarters.
- Launched higher education endorsement program.

2014

- In April, the IMA Management Accounting Academic Steering Committee is established.
- In June, the delegation of Ministry of Finance visits IMA headquarters.
- In December, IMA publishes "2014 Research Report on Managerial Accounting Practice in China" with Easy Finance.

2017

- In February, IMA launches CSCA (Certified in Strategy and Competitive Analysis).
- In March, IMA shares comments on the Ministry of Finance's consultation paper: No.100 Managerial Accounting Application Guide – Strategic Management along with other 22 managerial accounting application guides.
- In July, IMA launches the Chinese version of its flagship magazine Strategic Finance.
- In November, IMA publishes "Management Accounting Glossary".
- In December, the 10th Anniversary of Chinese CMA event is held in Beijing.

2016

- In May, IMA signs the MOU with Shanghai National Accounting Institute.
- In May, IMA launches LMS (Learning Management System).
- In August, IMA publishes "Advancing Innovation".
- In November, IMA publishes "Management Accounting Competency Framework".

2015

- In February, IMA assists in furthering China Enterprise Internal Control Standards Committee and COSO to sign the memorandum of understanding.
- In March, IMA Management Accounting Training for University Key Teachers is held in Beijing.
- In October, the delegation of Ministry of Finance and National Accounting Institute visits IMA headquarters. The Managerial Accounting Construction Summit is held in October.
- In December, IMA launches the Chinese Registration System.



IMA's journey in China

IMA中国大事记

2018

- In May, seven more universities join the IMA Higher Education Endorsement Program.
- In June, IMA released the exposure version of enhanced Management Accounting Competency Framework.
- In July, the delegation of Shandong SASAC visits IMA headquarters.

2019

- In February, Haier's Win-Win Value-added Approach, published as the cover story in the award winning bilingual Strategic Finance magazine
- Established a \$250K research fund for leading Chinese academics to advance practice with compelling, relevant, and thought-provoking research.
- A special guest invitation is made to the 100th year anniversary celebration in San Diego this June.
- Alipay payment option for user convenience is under development.
- The enhanced Management Accounting Competency Framework is launched.
- Signing MOU with School of Management, Fudan University, for future collaboration in multiple areas.
- Signing MOU with China Electricity Council.
- Collaborative meetings and pending projects/relationships with CACFO, CICPA and ASC.
- Signing MOU with MOU with Shanghai Advanced Institute of Finance
- Signing MOU with Fosun Group
- Signing MOU with China International Contractor Association CHINCA
- Started joint research with Haier Group and Fudan University
- Started joint research with SNAI
- New version of IMA China website go live.
- Chengdu office established.
- Signing MOU with XNAI
- Establishing IMA China Academic committee
- Launching joint research with Changhong and Industry Management Accounting Research Center



IMA's journey in China

IMA中国大事记

2021

- IMA signed MOU and host a joint event with Sichuan Tianfu New Area Management Committee.
- IMA signed MOU with Shanghai Pudong Financial Promotion Association
- IMA signed MOU with Shanghai Foreign Investment Association
- IMA signed MOU with OCBC WingHang (China) Group, Haier Group, WANT WANT Group, ZHONGHUI LLP, ANJI-CEVA, Bosch (China), Decathlon (China), and PwC.
- <Cost and Management Accounting> was jointly published by IMA and the Central University of Finance and Economics
- Launched China's 2nd CMA TVC campaign
- IMA held the 1st Management Accounting City Forum
- CMA Micro Course upgrades to version 2.0.

2020

- Making donation to Hubei province's COVID-19 prevention and control work through the Finance Department of Hubei Province.
- Launched IMA Digital Forum
- Signed MOU with China Chamber of International Commerce
- Establishing an "IMA education online learning webpage" with Beijing National Accounting Institute. IMA Podcast series being introduced to China.
- Launched IMA English podcast in China
- Launched Technology and Analytics center
- Launched WeChat mini program of <Strategic Finance>
- Launched new CMA WeChat Subscription account
- Signed MOU with Xiamen National Accounting Institute and PingAn group for joint research.
- Signed MOU with School of International Business Administration, Shanghai international studies university
- **IMA China's NGO registration has completed.**
- Launched new <Statements on Management Accounting> book series
- Signed MOU with Shanghai University of Finance and Economics
- Launched China's 1st CMA TVC campaign



IMA中国大事记

2006

■5月，应商务部邀请，开展成本实践研究，并出版《管理会计在中国》一书。

2007

■IMA作出CMA本土化的决定并在中国正式启动简体中文的CMA考试，同时提供中英双语版的相关产品及服务，如学习资源、网站、考生服务、教育课程等。这标志着IMA在中国的发展开启了新篇章。

2008

■11月，与中央财经大学共创管理会计研究所。

2009

■4月，首届IMA校园管理会计案例大赛启动。
■11月，与国家外国专家局签约，正式将CMA引入中国。

2010

■3月，国资委在其系统内推广CMA认证，央企财务人员积极参加培训。
■12月，与海尔集团及对外经济贸易大学联合设立“管理会计研究中心”。

2011

■11月，联合国资委和外专局举办首届中国管理会计国际化人才建设大会。

2012

■4月，出版IMA教学案例合辑。
■5月，倡议将每年5月6日为“管理会计宣传日”。
■出版《管理会计公告》。

2013

■5月，首届IMA管理会计学术论坛在北京举行。
■9月，央企财会职业技能竞赛启动，CMA知识体系成为管理会计部分考核重点。
■9月，国资委代表团访问IMA美国总部。
■在中国启动管理会计高等教育认可计划。

2014

■4月，IMA中国管理会计教育指导委员会成立。
■6月，中国财政部代表团访问IMA美国总部。
■12月，和安越咨询联合发布《2014中国管理会计实践调研报告》。

2021

■与四川天府新区管理委员会联合举办活动并签署战略合作备忘录
■与上海浦东金融促进会签署战略合作备忘录
■与上海浦东总部经济共享服务中心签署战略合作备忘录
■与华侨永恒银行（中国）有限公司、海尔集团、中国旺旺控股有限公司、中汇会计师事务所、安吉智行物流有限公司、博世（中国）、迪卡侬集团、以及普华永道等八家企业签署白金级企业战略合作伙伴关系备忘录
■联合中央财经大学出版了《成本与管理会计》教材
■CMA宣传系列项目第二年成功发布
■首次管理会计城市论坛成功举办
■“轻听”CMA平台全新升级2.0版本

2020

■IMA通过湖北省财政厅向湖北新型冠状病毒肺炎防治工作捐款
■IMA大咖云讲堂上线
■与中国国际商会签署战略合作备忘录
■与北京国家会计学院联合开发教育专区
■英文播课系列在中国推出
■科技与分析中心上线
■《战略财务》杂志小程序上线
■CMA订阅号上线
■IMA与厦门国家会计学院、平安集团展开合作研究
■IMA与上海外国语大学国际工商管理学员签署战略合作伙伴关系框架协议
■IMA在上海正式设立境外非政府组织代表处
■推出新版《管理会计公告》
■与上海财经大学签署战略合作备忘录
■首次在中国推出CMA广告宣传项目

2019

■2月，管理会计案例研究：海尔共赢增值表；该研究作为封面文章发表在双语杂志《战略财务》的二月刊上。
■IMA建立了25万美元的研究基金，用于支持中国顶级学者完成相关且具有思想引领意义的研究项目。
■IMA邀请了由中国顶级学者组成的代表团出席于2019年6月在美国圣迭戈举办的IMA 100周年庆典。
■即将增加支付宝为全新的支付方式，提供更方便的用户体验。
■发布升级版管理会计能力素质框架
■与复旦大学管理学院签署战略合作备忘录
■与中国电力企业联合会签署战略合作备忘录
■与中国注册会计师协会（CICPA）、中国注册会计师协会（CICPA）、中国会计学会（ACS）保持良好关系、进行合作会谈、跟进计划中的项目。
■与上海高级金融学院签署战略合作备忘录
■与复星集团签署战略合作备忘录
■全新的IMA中文官网上线
■与中国对外承包工程商会签署战略合作备忘录
■启动IMA、海尔集团、复旦大学三方联合研究项目
■启动与上海国家会计学院合作研究项目
■设立成都办公室
■与厦门国家会计学院签署战略合作备忘录
■成立IMA管理会计学术委员会
■发布与长虹集团、央财云研的三方联合研究报告

2018

■5月，中国大陆第二批共7所院校加入IMA管理会计高等教育认可计划。
■6月，IMA推出更新版“管理会计能力素质框架”。
■7月，山东省国资委代表团访问IMA美国总部。

2017

■2月，推出的注册战略和竞争力分析师（CSCA）认证。
■3月，IMA就财政部《管理会计应用指引第100号——战略管理》等22项管理会计应用指引征求意见稿函分享我协会相关看法。
■7月，IMA的旗舰刊物《战略财务》重新推出中文双月刊，并同步上线微信平台。
■11月，出版《管理会计词典》。
■12月，中文CMA十周年庆典。

2016

■5月，与上海国家会计学院签署年度合作备忘录。
■5月，IMA全新中文在线学习系统——IMA管理会计在线学习平台正式上线。
■8月，IMA首推《创新价值记分卡》。
■11月，IMA管理会计能力框架正式发布。

2015

■2月，协助推进中国企业内部控制标准委员会与COSO签署合作备忘录。
■3月，首届IMA高校管理会计骨干教师培训在北京举行。
■10月，中国财政部和国家会计学院代表团访问IMA美国总部。
■10月，举办管理会计体系建设峰会。
■12月，全新中文注册系统正式上线。

Thought Leadership: Research and Publication

思想领导力：研究及出版物

Thought provoking research

研究报告

The Data Analytics Implementation Journey in Business and Finance

商业及财务领域数据分析实施进程

- The first of three reports on the topic of the impact of advanced analytics on organizations.
关于高级分析对组织影响主题的三个报告中的第一个；
- Based on a survey of 170 IMA members from around the world.
根据对来自世界各地的170名IMA成员的调查形成；
- Examines the extent to which leading-edge analytics have been implemented by organizations, the business case for analytics initiatives, and other issues surrounding implementation.
研究了各组织实施前沿分析的实施程度、分析主动性的业务案例以及围绕实施的其他问题。



商业和财务领域的数据分析实施过程
The Data Analytics Implementation Journey
in Business and Finance



April, 2019

Thought provoking research 研究报告

Strategic Alignment for Driving Superior Business Results 通过战略调整，实现卓越业绩

IMA has been partnering with the American Society for Quality's Quality Management Division (ASQ/QMD) Technical Committee on Finance and Governance to recognize the common objectives of financial and quality management systems in organizations.

该报告是IMA一直与美国质量协会质量管理部门（ASQ / QMD）下属的财务和治理技术委员会携手合作，以确定组织财务和质量管理体系的共同主题报告中的一个。

This report describes and demonstrates a tool for achieving that focus, Hoshin Kanri, which starts with the strategic objectives for the organization and provides a disciplined process to: flow those objectives to each functional area; identify improvement initiatives and projects that support achievement of the objectives; develop operational performance indicators (OPI) supporting the organization's key performance indicators (KPI); and assign resources to each initiative.

这份报告阐述并展示了一项工具——方针管理（Hoshin Kanri），其可以实现上述的资源集中投入。方针管理始于组织的战略目标，它提供了一个严密有序的流程以便：将这些目标有序地安排给每个职能部门；确定改进举措和项目以支持目标的实现；制定经营绩效指标（OPI）以支持组织的关键绩效指标（KPI）；以及为每项举措分配资源。



January, 2019

Thought provoking research

研究报告

Statements on Management Accounting – Key Principles of Effective Financial Planning and Analysis

管理会计公告 —— 高效的财务规划与分析的关键原则

- This SMA provides the principles of effective FP&A organized into 12 principles and how to prioritize them, and details what the best-run organizations do differently with FP&A.
- It also discusses the role of technology, the competencies needed, how to get started, and how to “sell” the need for FP&A improvement to top management.
- 本公告归纳了高效的FP&A必须坚守的12项关键原则，解析了如何判定其优先级，并总结了经营状况最好的组织在FP&A上的独门诀窍。
- 本公告还详细分析了技术的作用、所需的能力、从何入手，以及如何向最高管理层推荐改进FP&A的诉求。



Key Principles of Effective
Financial Planning and Analysis

Statement on Management Accounting

August, 2019



Thought provoking research 研究报告



September, 2019

Report: Achieving a Competitive Advantage in the Digital Age – The Value of Training and Certification

研究报告：在数字时代获得竞争优势——培训和认证的价值

- This report deeply analyzes that organizations must adapt to that constant change in order to survive and prosper in the digital age.
- One key to successfully adapting is having the right people with the necessary skills in place. organizations that emphasize and incentivize training and external certification of their F&A professionals perform functions more efficiently.
- 报告从组织管理的角度，深度剖析了如何利用数字化实现管理升级和职能转型。
- 其中指出，技术正在迅速改变数字时代的商业运作方式，企业必须适应这种变化才能生存和繁荣，而成功适应的一个关键因素是拥有合适的人才和必要的技能。报告强调，一个组织越重视认证，就越有可能拥有高效的财务和会计职能。

Thought provoking research 研究报告

Report: Increasing Your Value in the Digital Age – The Impact of Professional Certification

研究报告：在数字时代增加个人价值——专业认证的影响

- Finance and accounting (finance) professionals in turn must ensure they have the necessary skills to succeed and be “future-ready.”
- Pursuing professional certification is a sure way to show your potential to an employer.
- 从财会专业人士的不同角度，深度剖析了如何利用数字化实现管理升级和职能转型。
- 报告指出，从员工的角度来看，专业认证可以有效帮助个人职业成长与晋升。



September, 2019

Thought provoking research 研究报告

Report: Integrated Reporting 研究报告：综合报告

为试图更准确地披露可持续性发展战略和绩效的企业及财务和管理专业人士提供实施指引。

Provides guidance for companies and financial professionals who are seeking to provide more accurate disclosure of sustainability strategies and performance.

- 就价值创造的各个方面信息进行相关沟通
- 反映财务及非财务信息对价值创造的影响
- 针对可持续发展战略作出更好决策
- 建立利益攸关方信心

- Communicate all aspects of value creation
- Reflect the impact of financial and non-financial information on value creation
- Make better decisions about sustainable development strategies
- Build stakeholder confidence



November, 2019



Launching of
<Integrated
Reporting> at
workshop co-
organized with PwC

Thought provoking research 研究报告

Report: The Impact of Big Data On Finance - Now and In The Future

研究报告：大数据对财务的影响 -- 现状及未来展望

- This report examines how organizations are increasingly harnessing big data and how this change presents an opportunity for finance and accounting professionals to build on their proficiencies around data governance and analysis.
- It also identifies several key considerations that will allow companies to successfully implement big data initiatives.
- 本报告探讨了以“数据驱动价值”日益成为企业竞争战略的核心，以及组织如何越来越多地利用大数据，挖掘利用大数据的潜能。
- 报告进一步指出，尽管多数企业已经着手实施大数据，但仅有少数企业部署完成，而正确实施大数据，需要重点关注的关键领域。



January, 2020

Thought provoking research 研究报告

Report: CFO as Value Creator – Finance Function Leadership In The Integrated Enterprise

研究报告：CFO：价值创造者——财务部门在整合企业中的领导作用

- In the form of interviews, the study analyses the responsibilities and work of the financial department in the organization's sustainable development business and integration of enterprise activities.
- 该研究以访谈的形式，了解了财务部门在组织的可持续发展业务和整合企业活动中所承担的职责与开展的工作。

ima[®] | The Association of
Accountants and
Financial Professionals
in Business
美国管理会计师协会



July, 2020



Thought provoking research 研究报告

Report: Finance Function Partnering For The Integration of Sustainability in Business

研究报告：财务部门在企业可持续发展整合中的合作伙伴角色

- This study aims to demonstrate the important role that CFOs and finance professionals can play in corporate sustainability and the practical frameworks and approaches that can be used to actively work with other business units to achieve corporate SUSTAINABILITY goals.
- 该研究旨在展现CFO及财务专业人士在企业可持续发展中可发挥的重要作用，以及在此过程中如何积极与其他业务部门合作、共同实现企业可持续发展目标，可采用的切实可行的框架及方法。



July, 2020

Thought provoking research 研究报告

Report: Transforming the Finance Function with RPA

管理会计公告：RPA助力财务职能转型

- The report aims to provide accounting professionals with more comprehensive information about RPA so that they can play a greater role in the RPA projects they organize or collaborate with.
- 该公告旨在向财会专业人士更全面提供有关RPA（机器人流程自动化）的信息，使他们能在其组织或合作的RPA项目中扮演发挥更大作用。

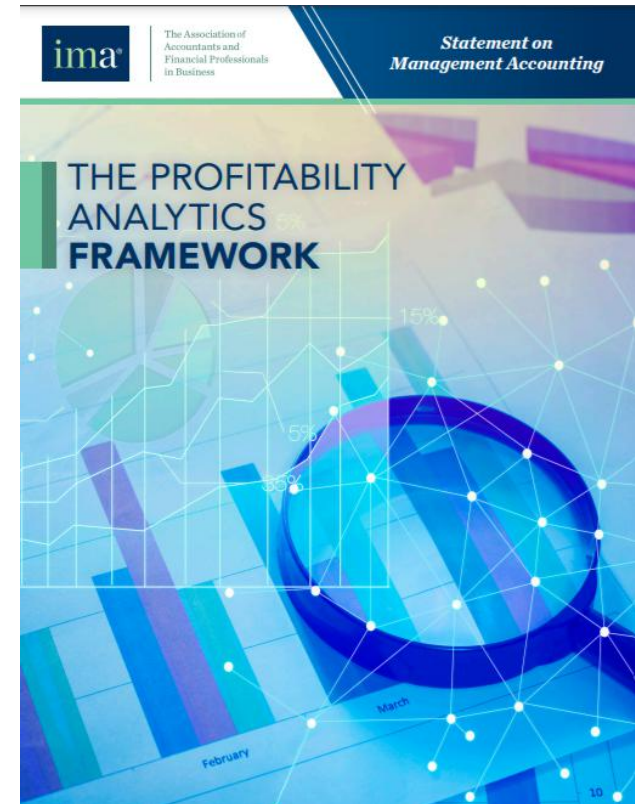


September, 2020

Thought provoking research 研究报告

Statement on Management Accounting (SMA) : The Profitability Analytics Framework 盈利能力分析框架

- This SMA presents the Profitability Analytics Framework, which provides a practical road map for management accountants to acquire broad knowledge of their business and take on a more active partner role in every key area of the business.
- 本公告提出了盈利能力分析框架，为管理会计师如何通过盈利能力分析来支持组织内部决策提供了指引，使管理会计师可以积极参与组织内部的各项活动，如参与战略的制定和执行。



November 2020

Thought provoking research

研究报告

Report : The Impact of COVID19 on the Finance Function

新冠疫情对企业财务职能的影响

- This report examines the impact of the pandemic on finance functions of organizations around the world. It describes the impact of the pandemic on companies' revenues and staffing levels, finance function priorities, the areas in which finance professionals are looking to upskill, and issues related to reskilling.
- 本报告聚焦全球范围内，新冠疫情对企业财务职能及企业自身带来的显著影响与艰巨挑战。重点讨论了以下三个内容：新冠疫情对企业、员工和薪酬的影响；企业财务职能的优先事项发生了怎样的变化；财务工作所需的专业技能及财务人员自我提升的能力发生了怎样的变化。



January 2021



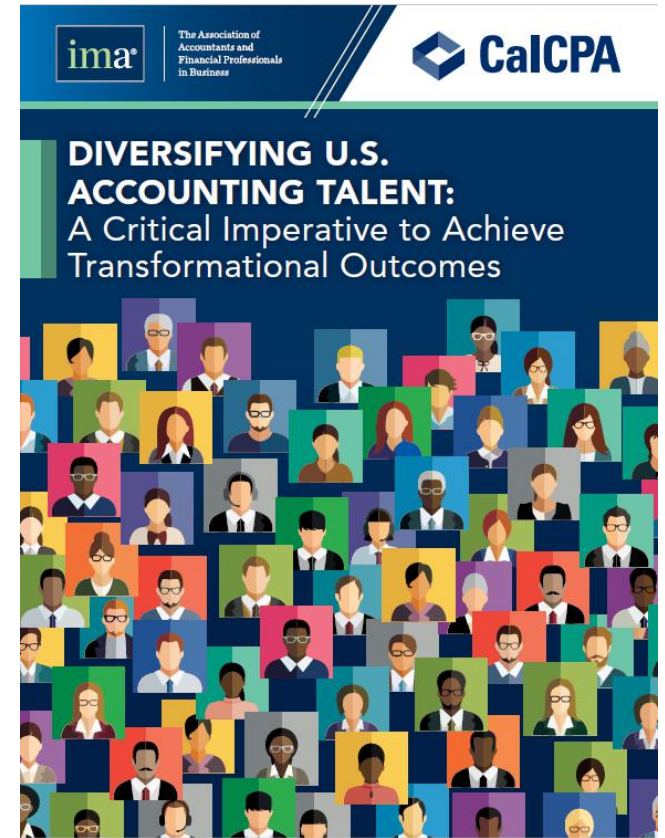
Thought provoking research

研究报告

Report : DIVERSIFYING U.S. ACCOUNTING TALENT: A Critical Imperative to Achieve Transformational Outcomes

多元化美国会计人才：实现企业转型的关键

- IMA and CalCPA (California Society of Certified Public Accountants), working collaboratively with research partners, contributors, and advisors, conducted a research study of diversity, equity, and inclusion (DE&I) in the U.S. accounting profession. The report presents an assessment of the current state of DE&I in the U.S. accounting profession through key survey findings and an in-depth, discrete look at each demographic focus area.
- IMA 和 CalCPA（加利福尼亚注册会计师协会）与多方合作，对美国会计行业的多样性、公平性和包容性进行了调查研究。这项研究通过问卷调研以及离散研究等方式，对美国会计行业的 DE&I 现状进行了评估。



February 2021

Thought provoking research

研究报告

Report : Building Financial Reporting Resilience Through Collaborative Cloud-Based Solutions

通过协同云解决方案实现财务报告灵活性

- This report describes how short-term adaptations rooted in the COVID-19 pandemic can accelerate financial transformation with respect to corporate reporting. The report concludes that although new time-saving cloud-based financial reporting platforms were a relatively low priority for organizations pre-pandemic, interest in agility and the potential continuation of remote working—including the control and oversight process—are bringing about renewed consideration of these systems.
- 本报告解析疫情之下的短期适应措施如何加快公司财务报告转型。该报告指出，虽然疫情暴发之前，可有效缩短财务报告编制时间的新兴云平台对企业的重要性相对较低，但随着敏捷开发日益受到关注且远程办公（包括控制和监督流程）模式有望成为常态，企业正重新燃起对云系统的兴趣。



March 2021



Thought provoking research 研究报告

Report : The State of Technology in Finance & Accounting - Middle East and India 信息技术在财会领域的影响及应用现状 - 中东和印度国家及地区

- This report examines how technology is affecting finance in other parts of the world, specifically the Middle East and India, and changes in the finance function. It is based on three surveys conducted in these regions during 2019 and 2020, which provide insights into the state of technology in the finance function in the Middle East and India, as well as insights into current trends and the impact of the COVID-19 pandemic.
- 本报告研究了技术如何影响世界其他地区（指中东和印度）的财务工作,以及财务职能的变化。本报告基于 2019 和 2020 年在中东和印度国家及地区进行的三项调查研究,在信息技术对其财务职能的影响和应用方面提供了见解,并纳入了对当前趋势和新冠疫情影响的分析。



June 2021

Thought provoking research 研究报告

Statement on Management Accounting (SMA) : An Agile Approach to Finance Transformation 适用于财务转型的敏捷方法

- This SMA explores the role of agility in the finance function, presents how finance functions can benefit from adopting an agile approach to transformation, and leverages finance and accounting use cases to demonstrate value delivery through the application of agile and scrum.
- 本公告探讨了敏捷在当今财务职能中的作用，并介绍了财务部门将如何通过敏捷实践获益。同时，公告选取了财务会计用例，以阐明在敏捷和scrum（复杂项目交付框架）应用下的价值交付。

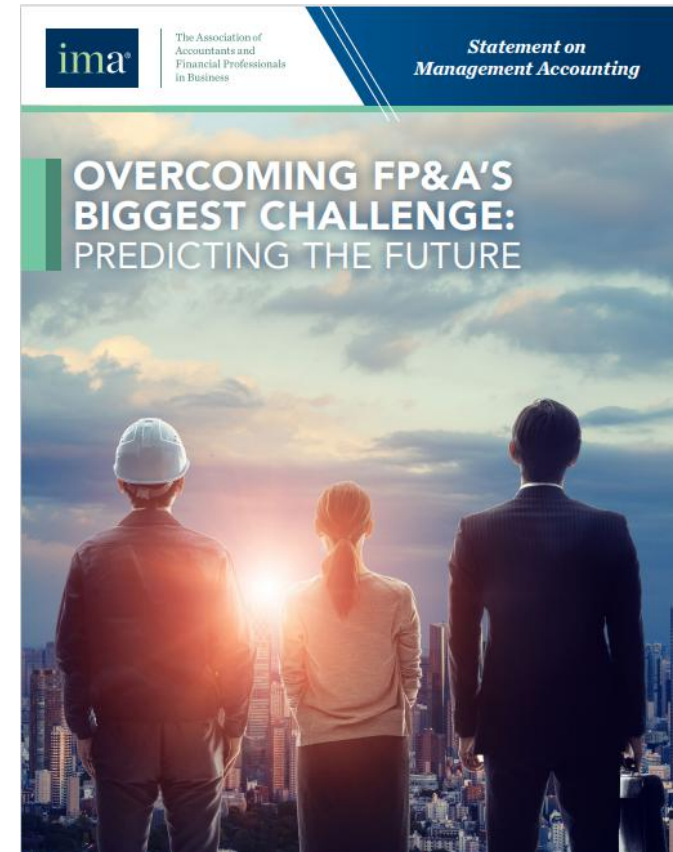


June 2021

Thought provoking research 研究报告

Statement on Management Accounting (SMA) : Overcoming FP&A's Biggest Challenge: Predicting the Future 克服财务规划与分析的最大挑战：预测未来

- This report provides several specific ways that all companies can use predictive analytics to improve forecasting and be able to make course corrections more quickly, for example expand the data available, use scenario planning, etc.
- 本公告提出了一些预测分析的方法，帮助企业提高其预测能力以及快速修正能力，例如扩大可用数据规模，使用情境规划等九种方法。

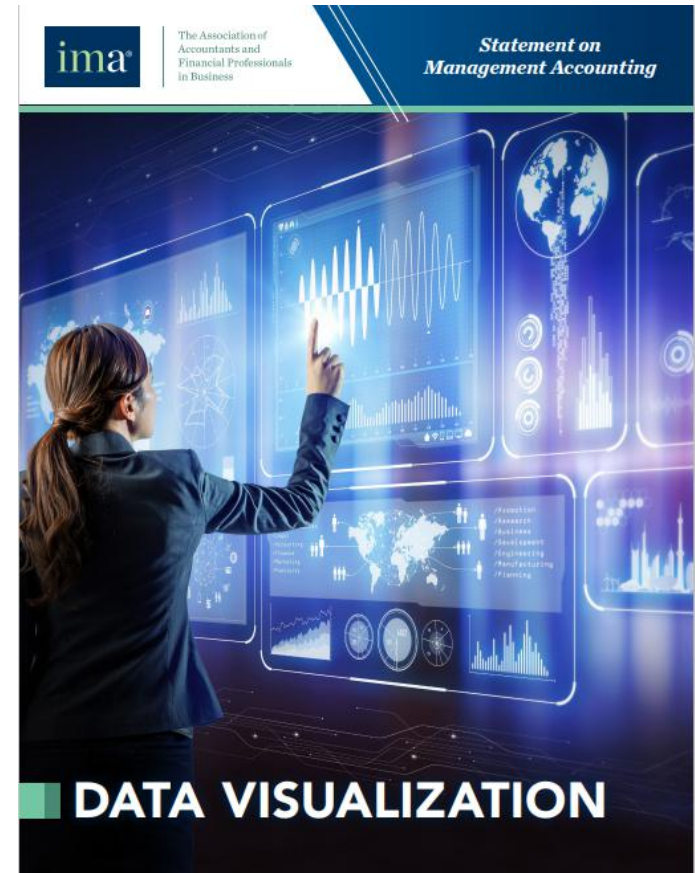


August 2021

Thought provoking research 研究报告

Statement on Management Accounting (SMA) : Data Visualization 数据可视化

- This SMA covers the data visualization skills needed for accountants and finance professionals to be successful. Specifically, the SMA discusses explanatory and exploratory data visualization, how to create an effective visualization, and how to tell a story with your data.
- 数据可视化是财务专业人士取得成功所需的技能。本公告讨论了可解释性和探索性数据可视化分析方法、如何创建有效的可视化、以及如何使用数据讲述故事。



November 2021

Thought provoking research 研究报告

Statement of Position on Sustainable Business Information and Management 企业可持续发展信息披露与管理公告

- The statement, endorsed by IMA's Sustainable Business Management Global Task Force (IMA.SBM.GTF), expresses nine principles that are fundamental to building a successful and sustainable accounting ecosystem within an ever-changing landscape. These principles, which are meant to be applied to a changing regulatory and standard-setting environment, may be revisited as circumstances change.
- 该公告由IMA企业可持续发展信息披露与管理全球工作组（IMA Sustainable Business Management Global Task Force）发布，其中提出了九项原则，致力于在瞬息万变的环境中建设可持续的会计生态系统。这些原则并非一成不变，可能会随着监管与标准制定环境的变化而变化。



November 2021

Thought provoking research 研究报告

IMA and EasyFinance co-branded biennial IMA 与安越咨询合作研究

CRCE was jointly founded by EasyFinance Management Consulting Co., Ltd and IMA on December 17, 2013, with a goal of helping Chinese enterprise transform their financial management and create more value by using management accounting tools.

安越咨询与IMA于2013年12月17日合作成立了中国管理会计最佳实践研究中心，帮助中国企业财务管理转型并通过管理会计工具创造更多价值。



2014



2015



2016



2018



The Global Economic Conditions Survey (GECS)

全球经济形势调查

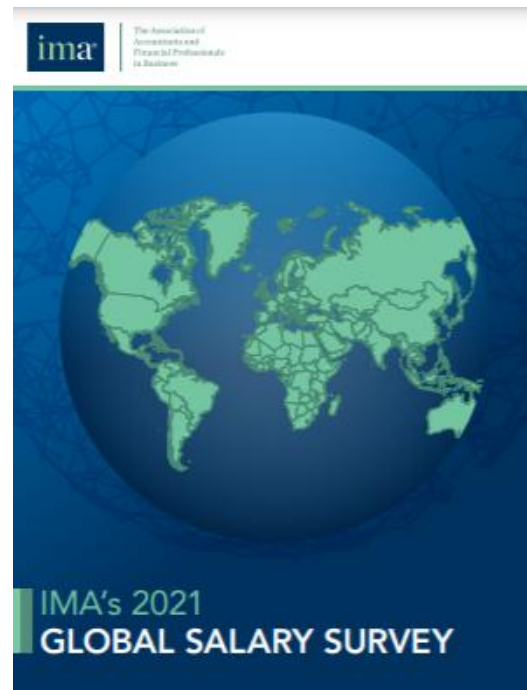
- The Global Economic Conditions Survey is carried out jointly by IMA and ACCA. This is the largest regular economic survey of accountants in the world.
- Its main indices are good predictors of GDP growth in the OECD countries and daily trend deviations correlate well with the VIX or 'fear' index, which measures expected stock price volatility.
- 全球经济形势调查报告是由IMA与ACCA联合开展的全球最大的会计师常规经济调查。
- 该报告的主要指数能够准确预测特定国家的GDP增长，同时它的每日趋势偏差值与衡量预期股价波动性的VIX或“恐惧”指数有着紧密相关性。



China Annual Salary Survey

中国年度薪资调查

- IMA's Global Salary Survey examines earnings specific to management accountants and those with the CMA® (Certified Management Accountant) certifications.
- It is organized into U.S. and regional surveys and analyzes self-reported data from members around the world.
- IMA全球薪资调查是专门针对管理会计师及持有CMA（美国注册管理会计师）认证人群进行的收入调查，其数据来源为美国及世界各地调查结果，以及对遍及全球的IMA成员自述报告数据进行分析形成。



IMA's Enhanced Management Accounting Competency Framework

IMA 《管理会计能力素质框架》 更新版

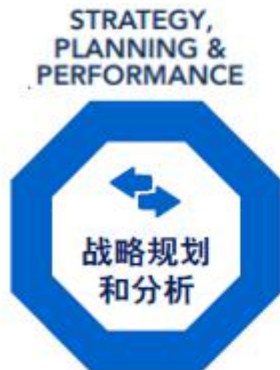


Competencies by domain

能力类别总括

DOMAIN 类别

COMPETENCIES 能力



The competencies required to envision the future, lead the strategic planning process, guide decisions, manage risk, and monitor performance.

预见未来，领导策略计划进程，引导决策，管理风险及监控业绩



The competencies required to measure and report an organization's performance in compliance with relevant standards and regulations.

按照相关标准及制度，衡量并报告组织业绩



The competencies required to manage technology and analyze data to enhance organizational success.

管理技术和分析数据，以促进组织成功

- Strategic and Tactical Planning
 - Decision Analysis
 - Strategic Cost Management
 - Capital Investment Decisions
 - Enterprise Risk Management
 - Budgeting and Forecasting
 - Corporate Finance
 - Performance Management
- 战略和战术规划
 - 决策分析
 - 战略成本管理
 - 资本投资决策
 - 企业风险管理
 - 预算和预测
 - 公司财务
 - 业绩管理

- Internal Control
 - Financial Recordkeeping
 - Cost Accounting
 - Financial Statement Preparation
 - Financial Statement Analysis
 - Tax Compliance and Planning
 - Integrated Reporting
- 内控
 - 财务记录
 - 成本会计
 - 财务报表编制
 - 财务报表分析
 - 税务法规和计划
 - 整合报告

- Information Systems
 - Data Governance
 - Data Analytics
 - Data Visualization
- 信息系统
 - 数据管理
 - 数据分析
 - 数据可视化

Competencies by domain

能力类别总括

DOMAIN 类别

BUSINESS ACUMEN & OPERATIONS



The competencies required to contribute as a cross-functional business partner to transform company-wide operations.

作为跨部门商业合作伙伴，对公司运营实行变革

LEADERSHIP



The competencies required to collaborate with others and inspire teams to achieve organizational goals.

与其他部门合作，鼓励团队实现组织目标

PROFESSIONAL ETHICS & VALUES



The competences required to demonstrate the professional values, ethical behavior, and legal compliance essential to a sustainable business model.

展现可持续性商业模式中所必须的职业价值观、道德行为以及遵纪守法

COMPETENCIES 能力

- Industry-Specific Knowledge
- Operational Knowledge
- Quality Management and Continuous Improvement
- Project Management

- 行业专业知识
- 运营知识
- 质量管理和持续发展
- 项目管理

- Communication Skills
- Motivating and Inspiring Others
- Collaboration, Teamwork, and Relationship Management
- Change Management
- Conflict Management
- Negotiation
- Talent Management

- 沟通能力
- 鼓励和启发他人
- 合作，团队协作和人际关系管理
- 改革管理
- 冲突管理
- 协商
- 人才管理

- Professional Ethical Behavior
- Recognizing and Resolving Unethical Behavior
- Legal and Regulatory Requirements

- 专业且道德的行为
- 识别并处理不道德的行为
- 法律及规则的要求

IMA International Research Foundation (IRF)

国际研究基金

- The IMA Research Foundation (IRF), founded in 1994, is a nonprofit, educational organization under IMA.
- The IRF's mission is to assist with the funding, development, and dissemination of timely research that assists accountants and financial professionals in their roles.
- IMA 研究基金会（IRF）成立于1994年，是IMA旗下的非盈利性教育相关组织。基金会的使命是资助、开发并及时传播最新研究及其成果，助力会计师和财务专业人士的专业发展。

IMA Research Foundation

GUIDELINES FOR SUBMITTING RESEARCH PROPOSALS



ima®

The Association of
Accountants and
Financial Professionals
in Business



IMA research fund in China

IMA中国管理会计研究基金

研究基金项目

IECJ春季短案例写作比赛

IECJ夏季长案例写作比赛

管理会计论文奖

博士生研究资助金项目

孵化类基金项目

新锐/杰出学者奖

开放性研究课题项目

年度重点研究课题项目

战略合作协议下的研究项目

- IMA has established the management accounting research fund in China with the aim of continuously promoting the development of management accounting, enhancing academic communication and exchanges between China and US, and further promoting the development of management accounting talents.
- IMA在中国设立管理会计研究基金，旨在持续推动管理会计发展，加强中美双方之间的学术领域沟通与交流，进一步促进管理会计人才培养与发展。
- The initial research fund is \$250,000, which is used to encourage academic experts in the field of management accounting in China to carry out more research projects of high standard and foresight.
- 首次启动的研究基金规模为25万美金，用于鼓励中国管理会计领域的学术专家们开展更多具有高水准和前瞻性的学术研究项目。

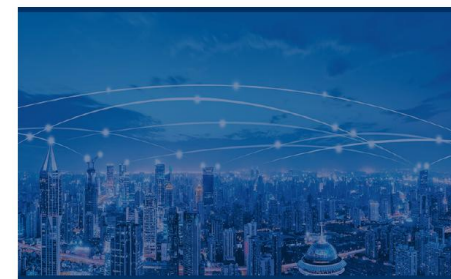
Joint research project by IMA, Changhong, and Industry Management Accounting Research Center

IMA、长虹集团、央财云研三方联合研究

IMA, Changhong and Industry Management Accounting Research Center joint research project on Intelligent Financial Sharing

IMA、长虹集团、央财云研三方关于“智能化财务共享”的联合研究项目

- IMA, Changhong and Industry Management Accounting Research Center joint research project on management accounting, which is <Management Accounting in China: Changhong Financial sharing implementation case>
- IMA与长虹集团、央财云研共同开展管理会计领域研究及相关的思想引领项目，即《中国管理会计实践：长虹财务共享服务中心实施案例》
- This project is based on Changhong Group's best practice on its intelligent financial center, and provides a reference case for China's management accounting.
- 本项目基于长虹集团内部财务共享的智能化最佳实践，为中国管理会计最佳实践提供价值参考。
- This project was launched at China Accounting News annual conference in Dec, 2019.
- 该报告于2019年12月在中国财会高峰论坛暨“数豆中国”年度盛典中正式发布。



中国管理会计实践
长虹开启财务共享“智能化”之路



Joint research projects by IMA, XNAI, and PingAn Group

IMA与厦门国家会计学院、平安集团的三方联合研究项目

IMA signed MOU with PingAn group and Xiamen National Accounting Institute (XNAI) to jointly set up practical research topics in the field of finance to conduct in-depth research on the application of management accounting

IMA与中国平安保险（集团）股份有限公司、厦门国家会计学院签署联盟伙伴合作协议，联合设立财务领域相关实践研究课题，共同就管理会计应用进行深入研究

- The establishment of the joint research project is also the latest development after the establishment of the partnership between IMA and PingAn Group;
- 共同研究项目的设立也是IMA与平安集团合作伙伴关系建立后的最新进展。
- On March 15, 2020, IMA and PingAn Group signed MOU, and PingAn Group became a Platinum Enterprise Partner of IMA. The two sides started to conduct extensive cooperation in management accounting training, recommendation of excellent professional personnel, and joint research project of management accounting, international exchange and cooperation, etc.
- 2020年3月15日，IMA与平安集团签署了合作备忘录，平安集团成为IMA白金级企业合作伙伴。双方将在管理会计人才培养、专业技能培训、优秀专业人才推荐、管理会计“产学研”研究项目、国际交流与合作等多个方面进行广泛合作。



Joint research projects by IMA and SNAI

IMA与上海国家会计学院联合研究项目

Joint research project with Intelligent Finance research Center, Shanghai National Accounting Institute (SNAI)

IMA与上海国家会计学院（SNAI）智能财务研究中心正式签署战略合作

- Agreement was signed/stamped dated on August 3rd, 2019;
- 2019年8月3日双方正式签署合作协议;
- In December 2019, IMA submitted the preliminary results of the study.
- 2019年12月，IMA提交该课题下初步研究成果。
- Survey on <Innovation and Application of Financial Sharing Mode Driven by Intelligent Technology> has been conducted, followed by both sides' joint research on it.
- 合作课题《智能技术驱动下的财务共享模式创新与应用实践研究》的调研问卷已通过IMA平台发布并回收，目前双方共同推进相关研究。

SNAI-IMA joint research project plan proposal on CFO Competence Framework and Leadership Research (Phase III)

IMA与SNAI共同开展《CFO能力框架和领导力研究（第三期）》联合研究

- A new project fully earmarked by Ministry of Finance;
- 该项目为SNAI智库项目2019年财政部中标课题;
- IMA has provided feedback on the research outline, and SNAI is working on drafting of the research.
- IMA已对研究大纲提出反馈建议，SNAI正基于大纲进行初稿撰写。



Thought provoking research

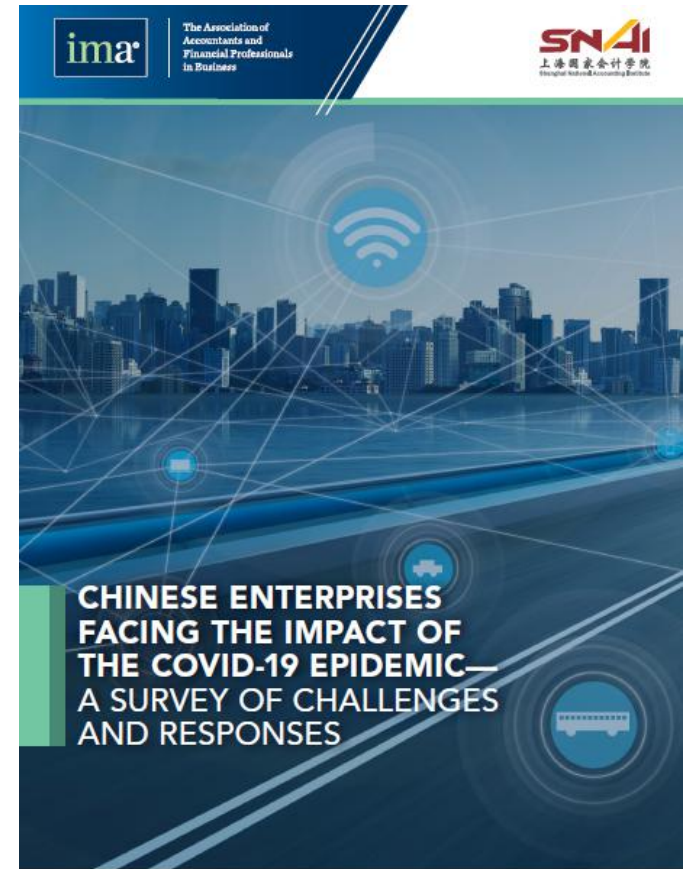
研究报告

Chinese Enterprises Facing The Impact of The Covid-19 Epidemic - A Survey of Challenges and Responses

中国企业面对疫情的影响 —— 挑战与应对问卷报告

IMA® (Institute of Management Accountants) and the Shanghai National Accounting Institute (SNAI) partnered to conduct a survey of finance professionals in China in February 2020 about the challenges of facing the COVID-19 public health crisis.

Amid the COVID-19 crisis, the top three challenges facing these enterprises were poor cash flow, labor shortages, and reduced effective demand. Small and micronized enterprises lacked effective crisis response capacity and risk management mechanisms, which led to poor operational results. Despite this, more than 50% of respondents said they were “cautiously optimistic” about the complete resumption of business operations by the end of the first half of 2020.



February, 2020

- In 2006, at the invitation of the Ministry of Commerce, IMA carried out cost practice research and published the book of <Management Accounting in China>; following which, 2019, IMA embarked on a study on the topic of Management Accounting in China: Costing Practice.
- 继2006 IMA应商务部邀请，开展了成本实务研究并出版了《管理会计在中国》一书后，2019年，IMA开展了2008管理会计在中国主题的后续研究：成本实践现状。
- The agreement was signed in July, 2020
- 合作协议于2020年7月签署。



Thought provoking research 研究报告

Innovation of Financial Shared Service under AI Technology – Survey finding Report

智能技术驱动下的财务共享模式创新与研究调查问卷分 析报告

This report comprehensively analyzes the current corporate financial shared service center creation and maturity status, and reveals that technology, organization structure and environment conditions will have impact on the creation of the financial shared service centers. This report not only enable readers to have a more comprehensive understanding of the financial shared service, but also made aware that attention needs to be paid to the issues during creation of the financial shared service centers and factors that may have great impact on the financial shared service.

本报告较为全面地分析了目前企业财务共享中心的建设状况以及成熟度状况，并指出了技术、组织以及环境情况会对财务共享中心的建设产生影响。本报告不仅可以使得读者可以较为全面地了解财务共享中心建设的现状，同时也可以了解到财务共享中心建设中需要关注的事项以及那些对财务共享中心建设有着较大影响的因素。



August, 2020

Thought provoking research 研究报告

Research report: Innovation and application of financial shared service under AI technology

智能技术驱动下的财务共享模式创新与应用实践研究报告

- Through case analysis, this report explores the role of financial shared services in financial transformation and points out that accounting centralization is not necessarily the starting point for financial sharing. It also finds that technology has a significant effect on the development of financial shared services.
- 通过案例分析，本报告探索了财务共享服务在财务转型中的作用，并指出会计核算的集中共享并非财务共享的必然发展起点，以及技术对于财务共享的飞跃发展有至关重要的推进作用。



August, 2020



Thought provoking research 研究报告

Multiple Financing of Commercial Estate Industry in China

中国商业不动产多渠道融资方式浅析

This report takes the financing model of commercial real estate as the research object. Studying foreign advanced financing channels and combining with China's current commercial real estate financing capital status, aiming to find a multi-channel financing means that suitable for Chinese commercial real estate in order to solve financing difficulties post the pandemic.

本文选取商业不动产的融资模式作为研究对象，借鉴国外先进的融资渠道，并结合我国目前的商业地产融资现状，旨在寻找出适合我国商业地产的多渠道融资方式，解决其“融资难”的问题。



September, 2020

Thought provoking research

研究报告

Report: Financing and operation of commercial estate industry in the post-epidemic era

后疫情时代商业不动产的融资与经营

- This report is part of a series of research studies on the commercial estate industry. It focuses on commercial real estate financing methods and studies the development of the commercial estate industry inside and outside China. It includes the new challenges commercial real estate operations face after the epidemic and their business transformation measures, aiming to find a means to help the commercial estate industry solve financing and difficulties and operational issues post the pandemic.
- 本次研究是商业不动产同系列第二篇报告。报告以商业地产的融资方式为研究重点，梳理了国内外商业不动产的发展现状以及融资现状，结合商业不动产疫情后经营面临的新挑战及商业不动产企业的经营转型举措，试图解决后疫情时代商业不动产的融资及经营难题。



November, 2020



Thought provoking research 研究报告

IMA and Haier co-branded “Haier’s Win-Win Value-added Approach”

IMA 与海尔联合研究：共赢增值表

The purpose of the WWVA (Win-Win Value Added statement) is for ecosystem value measurement and value drive, to continuously measure the value added by the company, users, and service providers throughout the user engagement process.

WWVA（Win-Win增值声明）的目的是进行生态系统价值测量和价值驱动，在整个用户参与过程中持续测量公司、用户和服务提供商的增值。

“Haier’s Win-Win Value-added Approach is published as the cover story in the award winning bilingual Strategic Finance magazine 2020 February issue.

海尔Win-Win增值声明作为封面故事在2019年2月《战略财务》杂志发表。



February 2019

Thought provoking research 研究报告

IMA, Fudan University and Haier co-branded “WWVA Statement – Financial tools for the IoT Age”

IMA 与复旦大学和海尔联合研究：共赢增值表 – 物联网时代的财务工具

The purpose of the WWVA (Win-Win Value Added statement) is for ecosystem value measurement and value drive, to continuously measure the value added by the company, users, and service providers throughout the user engagement process.

WWVA共赢增值表的目的是进行生态系统价值测量和价值驱动，在整个用户参与过程中持续测量公司、用户和服务提供商的增值。

“WWVA Statement – Financial tools for the IoT Age” is published as the C-suite report in Sep 2020.

高管洞察报告《共赢增值表 - 物联网时代的财务工具》在2020年9月发表。



Thought provoking research 研究报告

Research Project: Management accounting applications among Zhejiang private companies

浙江民营企业管理会计应用现状研究项目

Survey finding report 问卷分析报告

- The research team found that the main problems of Zhejiang private enterprises in terms of management accounting practices are, the lack of management accounting talents, the relatively limited application of management accounting, the insufficient understanding of management accounting knowledge and insufficient attention to management accounting.
- 通过调研问卷，课题组发现浙江民营企业在管理会计应用方面的主要问题有，管理会计人才缺乏、管理会计的应用比较粗浅，企业对管理会计的认知不够、对管理会计的重视程度不够。

Research report 项目研究报告

- The report pointed out that Zhejiang is the most active region in the private sector of China's economy, and Zhejiang's enterprises are dominated by small and medium private enterprises. In addition, the next step should focus on improving the internal and external environments of private enterprises and intensifying the government's efforts in promoting management accounting.
- 报告指出，浙江是中国民营经济最活跃的地区，浙江省的企业仍以中小民营企业为主。同时，下一步推广管理会计应该以改善民营企业的内外部环境为着力点，继续加大对管理会计的推广力度。



Thought provoking research

研究报告

Carbon asset management under the framework of management accounting activities 管理会计活动框架下的碳资产管理问题研究

- This study uses the "Basic Guidelines for Management Accounting" as the framework to explore how companies can identify, develop and manage carbon assets in management accounting activities. By describing the impact and challenges of carbon asset management on traditional management accounting activities, it points out the direction of corporate management accounting innovation in a low-carbon economy and provides suggestions on how companies manage carbon assets.
- 本研究在实地调研和理论研究的基础上，从企业碳资产管理视角出发，以《管理会计基本指引》为框架，探讨企业如何在管理会计活动中识别、开发和管理碳资产。通过描述碳资产管理对传统管理会计活动的影响和挑战，论证低碳经济下企业管理会计创新的方向，并为企业如何管理碳资产提出针对性的建议。

ima[®] The Association of Accountants and Financial Professionals in Business
美国管理会计师协会



February, 2021



Thought provoking research

研究报告

Research study on ethics: The impact of financial frauds on the overall market value of Chinese companies listed offshore

职业道德的价值：基于财务舞弊案对中国境外上市公司整体市值影响的考察

- *The report provides an overview of Chinese companies listed overseas and summarizes the ethical issues they have experienced. By analyzing several typical cases, the report explores the impact of suspected violations of professional ethics or financial frauds on the company's market value and the overall value of Chinese companies listed overseas. And to give a solid, sound, and sustainable foundation for the business field, it also provides some suggestions in strengthening ethics compliance.*
- 报告总结中国公司境外上市概况，梳理其所经历的职业道德危机事件及其特点，解剖若干典型案例，探究涉嫌违背职业道德或财务舞弊的事件对公司本身的市值和中国境外上市公司整体市值的影响，量化分析职业道德对现代公司价值的影响力，并提出强化职业道德遵从性的建议，为商业领域提供坚实、稳健、可持续发展的基础。

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The Association of
Accountants and
Financial Professionals
in America
美国管理会计师协会

南开大学商学院
NANKAI BUSINESS SCHOOL



职业道德的价值：
基于财务舞弊案对中国境外
上市公司整体市值影响的考察

May, 2021

Thought provoking research 研究报告

Research study on disruption of supply chain post covid-19 among SMEs

新冠疫情对中小企业供应链管理的影响及对策研究项目

Survey finding report 问卷分析报告

- The report investigates the impact of COVID-19 on SMEs' supply chain management from multiple dimensions, including supplier management, inventory management, production management, sales and channel management, human resource management, and information system management. It also provides insights as to how SMEs respond accordingly.
- 问卷分析报告从供应商管理、库存管理、生产管理、销售和渠道管理、人力资源管理和信息系统管理等多个维度，全面调查新冠疫情对中小企业供应链管理的影响，以及企业应对之策。

Research report 项目研究报告

- This report explores the state of SMEs' supply chain management before the pandemic, analyzes the challenges that SMEs face following the outbreak of the pandemic and the corresponding measures. It has practical significance for SMEs to optimize supply chain management and improve resilience.
- 本报告探究新冠疫情前中小企业供应链管理的基本情况、分析新冠疫情对供应链管理的多方面影响，以及中小企业面对疫情冲击的应对措施。研究对于优化中小企业供应链管理，提高应对疫情冲击的弹复力具有重要的实践意义。



May, 2021



Thought provoking research 研究报告

Research study on FP&A development and application among Chinese SMEs 中国中小企业FP&A实践研究

Survey finding report 问卷分析报告

- This report examines whether the FP&A principles proposed by Western countries fit Chinese corporate practices, evaluates the practical effects of implementing FP&A in Chinese SMEs, and explores the motivations and conditions.
- 本报告检验了西方企业的 12 项 FP&A 实践准则在中国的适用程度，评估了中国中小企业 FP&A 的实践效果，并挖掘了中国中小企业推行 FP&A 的动因和条件。

Research report 项目研究报告

- This report refines the framework of the effectiveness of FP&A in Chinese SMEs and proposes a model for FP&A's deepening implementation path. Also, it includes a case study to explore the practical problems faced by SMEs in the process of deepening the implementation of FP&A and provides solutions.
- 本报告修正了FP&A在中国中小企业的有效性原则框架，并提出了 FP&A 深化落地路径模型。最后，选择了一家有代表性的公司作为案例，研究了 FP&A 在中小企业深化实践过程中，面临的现实问题和解决思路。



Thought provoking research 研究报告

Corporate financial risk prevention under the “One Belt One Road” initiative - Vietnam

“一带一路”倡议下企业财务风险防范-越南篇

- Based on the One Belt One Road Initiative, this report focuses on Vietnam's financial and taxation environment, accounting system, and the status of Chinese-funded enterprises in Vietnam. It discusses the financial risks faced by these enterprises and how to deal with them from the perspectives of the board of directors, management, financial personnel, and tax personnel.
- 报告通过研究“一带一路”的政策背景、该背景下企业的风险结构以及财务风险结构的相关理论和实务文献，聚焦越南金融财税环境、会计制度和中资企业在越现状。从董事会、管理层、财务人员以及税务人员的角度，探讨企业面临的财务风险以及应对之道。



October, 2021

Electric Vehicle Market and Subsidies Paper (focus on BYD electric vehicle) / 比亚迪电动汽车案例

- Electric Vehicle Market and Subsidies (with a focus on BYD) paper by IMA research team (Robert Liou and Kip Krumweide), was published in <Strategic Finance> in 2019 September issue.
- 由IMA研究团队撰写的案例---《破解比亚迪式电动汽车发展困局》在9月刊《战略财务》中发布

Notes: BYD is a leading Chinese manufacturer of electric Vehicles, buses, medium- and heavy-duty trucks and forklifts, as well as rail transit and energy storage.

注：比亚迪是中国领先的电动汽车、公共汽车、中、重型卡车和叉车，以及轨道交通和能源存储制造商。

实务案例 | CASES

破解比亚迪式电动汽车发展困局

Robert Liou, CPA, MBA and Kip Krumweide, CPA, CMA, CSCA, PhD

过去10年间，全球电动汽车市场，尤其是中国电动汽车市场以及特斯拉在美国市场的表现极为抢眼，这与多方因素有关：首先，人们对燃油汽车所带来的污染担忧与日俱增；其次，原油供应变得越来越不稳定，能源的勘探开发也越发困难，成本高昂。全球多个国家政府和企业合作努力，希望能找到更便宜、更清洁的能源来维持经济和社会发展。其中之一，就是推动使用可再生能源发电。尤其是先进交通运输业采用的清洁能源供应，美国能源消费报告，运输业和制造业占全球能源消耗的50%。

社会对电动汽车的出現抱以极大期待，大众汽车等主流汽车制造商也宣布，到2025年，他们将停止生产内燃机汽车。

如图1所示，自2014年以来，全球插电式电动汽车的销量大幅增长。彭博社等主要媒体发布的报告显示：2018年电动汽车销量200万余辆；到2025年，全球电动汽车销量将超过1000万辆；而到2040年，这一数字将达到5000万辆。且不论这些预测是否成真，一个事实是，2016年，中国超过美国，成为全球最大的电动汽车市场；2018年，中国电动汽车销量达120万辆。因此普遍认为中国将在未来几十年内独霸电动汽车市场。



数据来源：<https://ir.bmw.com>

在电动汽车带来的冲击下，全球汽车行业都处于深度调整和重组状态，而在电动汽车发展大国中国，汽车相关企业、政府、投资者以及消费者都面对由此引发的一系列新问题。本文将展示管理会计方法如何帮助这些群体应对不确定性，并找到具体问题的解决之道。

问题1：电动汽车何以在中国创下销售奇迹？

这或许与中国的驱动力、原材料成本相对较低、相关标准还未严格执行等因素相关，但最大的原因，可能是政府为推动市场发展而实施的补贴和激励措施。这些激励措施（原文将展开讨论）推动

20 / 战略财务 2019 / 08

Research paper <PetroChina: When Environment Sustainability Meets Financial Viability> / 中国石油：环境可持续性VS.财务可行性

- Research paper of <PetroChina: When Environment Sustainability Meets Financial Viability> by IMA research team and professor from Beijing National Accounting Institute. (Robert Liou and Dr. Zhou Yun), was published in <Strategic Finance> in 2020 January issue.
- 由IMA研究团队和北京国家会计学院教授联合撰写的案例---《中国石油：环境可持续性VS.财务可行性》在2020年1月刊《战略财务》中发布
- This article focuses on PetroChina, exploring its contribution to environmental sustainability, studying its economic performance in recent years, and assessing its future development.
- 本文聚焦中国最大的能源公司和主要化石燃料生产商——中国石油天然气股份有限公司（以下简称“中国石油”），探讨其在环境可持续性方面做出的贡献，研究公司近年来的经济效益，评估其未来发展。



More local cases developed from China Case Competition / 更多由中国案例写作大赛开发的本土案例

让CMA与时俱进
区块链：颠覆性机会

变通案例 | CASES

变通案例 | CASES

G公司的内控变革

2019年，G公司管理层决定对内部控制体系进行全面的梳理和更新。在经历了长达半年的调研和论证后，G公司最终选择了一套全新的内控体系。这套体系不仅提高了公司的运营效率，还有效降低了风险。本文将详细介绍G公司内控变革的背景、过程和成果。

变通案例 | CASES

有效激活自主型前端组织

MAXIMIZING THE BENEFITS OF SELF-MANAGING FRONT-END BUSINESS FUNCTION

随着市场竞争的日益激烈，企业纷纷寻求新的增长点。自主型前端组织作为一种新型的组织形式，受到了越来越多的关注。本文将探讨如何有效激活自主型前端组织，提高企业的竞争力。

变通案例 | CASES

运用业务周转解决业务前瞻和业务瓶颈问题

曹凤鸣

活字簿管理会计的基本理论解决实际的商业问题，不仅需要有一定管理会计基础知识，还有一定的实务工作经验。本文将介绍如何利用业务周转来解决业务前瞻和业务瓶颈问题。

变通案例 | CASES

HC游泳馆何以扭亏为盈?

JOY CAN IC SWIMMING POOL REPORT A TURNAROUND?

2018年，HC游泳馆在经历了连续两年的亏损后，终于实现了扭亏为盈。本文将分析HC游泳馆扭亏为盈的原因，包括成本控制、服务提升和营销策略等方面的改进。

变通案例 | CASES

X农商行精细化管理实践

DELICACY MANAGEMENT IMPLEMENTED BY A RURAL COMMERCIAL BANK

精细化管理是现代企业管理的重要特征。X农商行通过精细化管理，提高了运营效率，降低了成本。本文将介绍X农商行精细化管理的实践经验和成果。

变通案例 | CASES

特斯拉的运营迷局

2019年5月 386

总部位于美国硅谷的特斯拉公司是全球第一家采用锂离子电池的电动汽车企业。其以高科技企业自居，所推出的高性能纯电动汽车颠覆了传统汽车制造业。本文将探讨特斯拉运营中的迷局和挑战。

变通案例 | CASES

真实公司不真实

2019年5月 386

在商业世界中，真实与不真实往往并存。本文将探讨如何识别真实的公司，避免被虚假信息所误导。

变通案例 | CASES

中国石化：环境可持续性VS.财务可行性

PetroChina: When Environmental Sustainability Meets Financial Viability

环境可持续性和财务可行性是企业发展的两个重要方面。中国石化作为一家大型能源企业，面临着环境可持续性和财务可行性的双重挑战。本文将探讨中国石化如何在这两者之间取得平衡。

变通案例 | CASES

单车公司本量利分析

VOLUME-PROFIT (VP) ANALYSIS OF A NG PLAYER IN CHINA

单车行业近年来发展迅速，吸引了众多企业进入。单车公司作为行业的新玩家，面临着激烈的市场竞争。本文将通过本量利分析，探讨单车公司的经营状况和盈利模式。

变通案例 | CASES

数：中国石化的估值

2019年5月 386

估值是企业价值评估的重要手段。本文将分析中国石化的估值情况，探讨影响其估值的主要因素。

变通案例 | CASES

变通案例 | CASES

S节能公司风险管理探究

THE STUDY OF THE RISK MANAGEMENT OF S ENERGY SERVICE COMPANY

风险管理是企业运营的重要组成部分。S节能公司作为一家能源服务企业，面临着复杂的风险环境。本文将探究S节能公司的风险管理实践和成效。

变通案例 | CASES

单车公司本量利分析

VOLUME-PROFIT (VP) ANALYSIS OF A NG PLAYER IN CHINA

单车公司作为行业的新玩家，面临着激烈的市场竞争。本文将通过本量利分析，探讨单车公司的经营状况和盈利模式。

变通案例 | CASES

数：中国石化的估值

2019年5月 386

估值是企业价值评估的重要手段。本文将分析中国石化的估值情况，探讨影响其估值的主要因素。

变通案例 | CASES

真实公司不真实

2019年5月 386

在商业世界中，真实与不真实往往并存。本文将探讨如何识别真实的公司，避免被虚假信息所误导。

变通案例 | CASES

单车公司本量利分析

VOLUME-PROFIT (VP) ANALYSIS OF A NG PLAYER IN CHINA

单车行业近年来发展迅速，吸引了众多企业进入。单车公司作为行业的新玩家，面临着激烈的市场竞争。本文将通过本量利分析，探讨单车公司的经营状况和盈利模式。

More local cases developed from China Case Competition / 更多由中国案例写作大赛开发的本土案例

实务案例 | CASES

瑞幸咖啡的盈利困局

LUCKIN COFFEE'S STRUGGLE TO MAKE A PROFIT
徐静涛, 冯强

实务案例 | CASES

美图公司战略转型浅析

A PRELIMINARY STUDY OF MEITU'S STRATEGIC TRANSFORMATION

职业道德 | ETHICS

财务舞弊与上市公司市值

FINANCE FRAUD AND MARKET VALUE OF LISTED COMPANIES
刘志远, 陈宇健, 梅丹, 王杰红

因此, 对中国境外上市公司职业道德建设从正反两方面的案例及其对市场的价值影响进行系统, 发

实务案例 | CASES

探解民企业管理会计应用难题

EFFECTIVE APPLICATION OF MANAGEMENT ACCOUNT IN PRIVATE ENTERPRISES
康群

隋

王通《文字·道源多贵》:“道人类并引, 道源作为一社特有的力量, 蕴含着人类社会历史, 商业发展基础成为重要基石, 职业道德是商业发展的基石, 职业道德是市场经济对公司参与者和长期价值的评价标准而飞跃今天, 因此, 职业管理会计(为素质框架)的载体, 优秀人才必不可少的基础能力, 道德标准。

在过去近20年中, 中国境外上市不仅促进了这些中国企业的全球发展, 促进了这些企业的全球效率, 同时, 大多数公司也取得了良好的发展, 促进了国内人才的发展, 促进了国内人才的发展, 促进了国内人才的发展。

令人惊讶的是, 在过去15年里, 中国境外上市企业数量和市值都出现了爆发式增长, 中国境外上市企业数量和市值都出现了爆发式增长, 中国境外上市企业数量和市值都出现了爆发式增长。

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实务案例 | CASES

人单合一的海尔财务模式

HAIER'S FINANCE MANAGEMENT UNDER THE RENDANHEYI MODEL

实务案例 | CASES

高端蔬菜全产业链价值创造

VALUE CREATION ALONG HIGH-END VEGETABLE INDUSTRY CHAIN
田雷, 唐明博

发 展和创造, 技术变革, 资本变革, 高附加值, 低资源消耗的高端农业, 已成为新时期我国产业升级, 实现经济发

的“人单合一”模式, 已成为新时期我国产业升级, 实现经济发

实务案例 | CASES

IMAHOSTS RPA ROUNDTABLE IN CHINA

BY YUFEI SHAN, CMA, CSCA, CPA, CFE
February 1, 2021

IMA (Institute of Management Accountants) held a roundtable discussion called “Transforming the Finance Function with RPA” in Shenzhen, China, on December 11, 2020.

IMA (Institute of Management Accountants) held a roundtable discussion called “Transforming the Finance Function with RPA” in Shenzhen, China, on December 11, 2020.

学术观察 | ACADEMIC OBSERVATION

新冠疫情对中小企业供应链影响

SUPPLY CHAINS OF SMES SEVERELY AFFECTED BY COVID-19
朱浩, 胡玉明

实务案例 | CASES

电影公司业务投资决策分析

ANALYSIS OF BUSINESS INVESTMENT DECISIONS OF A MOVIE STUDIO
白春华

企业一方面建立实

业一方面建立实

实务案例 | CASES

商贸企业ABC及CVP分析应用

APPLYING ABC COSTING AND CVP ANALYSIS ON A TYPICAL COMMODITY TRADING COMPANY
刘祺, Robert Liu

商贸企业以商品贸易为主要业务, 即采购商品, 存储商品并

联系客户进行销售, 作为销售商, 其大部分成本来自三个

服务中心: 采购、商品库存和客户服务。商品成本分为A、

B、C、D四大类, 其中, A产品采购量大, 占用公司各种资源比例

也最多, 从成本上看来其绝对价值是最大的; B产品采购量其次, 其利

润绝对值与A产品相当; C产品采购量第三; D产品采购量最

少, 从其毛利绝对值来看也是最低的。

公司财务总监Linda与其下属财务总监Amy, 会计师Amanda

自公司成立之初便加入了公司, 因公司以采购业务为主体, 财务人员通

常将进货单作为可直接归属于成本计算对象的直接成本, 采购、商品

存储与客户服务的职工薪酬、折旧费、电费等问题成本与长期

期间成本。多年来, Linda和Amy一直将这些间接费用分配给每类商

品, 就好像它们是可变成本一样。

公司最近上任一位总经理, 在了解公司现状后, 提出了新的战略

思路——“抓大放小”, 他认为必须对原有四类商品进行优化排序, 对

利润贡献低的商品, 考虑逐步

退出。作为下一步决策依据:

对利润率贡献较高的商品和重要

商品确保成本, 制定最低成本要

求。因此, 财务部每月不仅要提

供公司整体运营情况, 还要根据

商品类别分别核算出其成本和

利润, 找到每类商品的保本点,

为下一步业务发展决策提供依

据。为此, Linda召开了部门会

议, 会上, Amy提出, 从财务角

度计算每类商品的保本点就是按

成本变化的变动成本, 企业所有的

成本分为两类, 一类是随销售量

变化而变化的变动成本, 另一类

是不随销售量变化的固定成本, 只

需要把变动商品的成本分成这两

类并进行分析, 可容易地识别出

每类商品的保本点和保本量。

管理会计师Amanda认为,

为, 是排他性, 公司日常经营活

动主要集中在三个服务中心进行, 其

所产生到三个服务中心, 折旧费, 租

赁费, 电费等等成本不可移动的固

定成本, 会成本费用和其他部分, 这

些费用是随销售量而变化的变动成

本。其次, 在对四类商品进行



More local cases developed from China Case Competition / 更多由中国案例写作大赛开发的本土案例

实务案例 | CASES

海底捞成本战“疫”

VALUE CHAIN COST MANAGEMENT AT HAIDILAO HOTPOT

陈浩, 许继明, 李爽

实务案例 | CASES

烟草公司“小单元”经营模式探索

APPLICATION OF AMOEBA MODEL IN TOBACCO COMPANY

黄永辉, 杨皓, 汪宏林

专题报道 | SPECIAL ISSUE

数智时代财会人才培养挑战

CHALLENGES TO TALENT DEVELOPMENT IN THE DIGITAL INTELLIGENCE ERA

王倩倩

破解成本管理困境

WAYS TO OVERCOME THE HURDLE TO COST MANAGEMENT

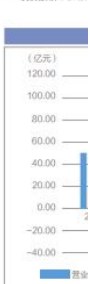
陈浩, 黄方雷

FOUR
CONTAINERS
OF
INTEGRATED
COST
MANAGEMENT

陈浩, 黄方雷

同发, 带来便利的同时, 也面临着新的挑战。随着消费升级, 消费者对品质、体验、服务的要求越来越高。2018年, 公司开始引入与。

直营模式成绩
发展初期, Fiorini



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实务案例 | CASES

如何实现订单级成本核算

IMPLEMENTATION OF ORDER-BASED COST ACCOUNTING

王月, 包苏日古雅

包 裹是无形的“脂肪”，在商品极大丰富的当下更是一种竞争手段。但对于包装印刷企业来说，这些各式各样的包装产品意味着大相径庭的加工工艺流程。且因大部分包装印刷企业的产品生产都实现了信息化和机械化，产品成本构成中的间接费用占比一直处于上升状态，间接成本在核算中的分摊方法过于简单和笼统，真实性的影响越来越大。倘若间接成本的分配方法过于简单和笼统，或以表格形式主观判断，均会直接影响定价决策的质量。针对这些情况，包装印刷企业如何进行成本核算？本文以A公司为例进行分析。

订单成本信息获取困境

A公司成立于1993年，总投资1亿元人民币，占地10,000平方米，系中国与丹麦合资组建的技术先进、设备完善、管理严格的现代化包装企业，以精制包装为主提供设计、印刷、印刷、包装等印刷生产服务。随着客户需求的变化，产品外包装设计在新季度有所调整，产品工艺的调整面临着新的设计决策问题，且生产部门各个环节的工作任务同样调整。

A公司在保持传统银行低成本扩张策略，经过20多年的发展，已得到主动扶持与政策支持，企业的资金成本得到改善，正在由粗放型向内部

转型升级转变。公司的主营业务是提供设计、印刷、印刷、包装等印刷生产服务。随着客户需求的变化，产品外包装设计在新季度有所调整，产品工艺的调整面临着新的设计决策问题，且生产部门各个环节的工作任务同样调整。

产品成本特点
公司产品成本方面一是间接费用占比高，另外，人工高。因此，需

图1: NC公司主要业务流程



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学术观察 | ACADEMIC OBSERVATION



“沪港通”与公司成本黏性

SHANGHAI-HONG KONG STOCK CONNECT AND COST STICKINESS

梁上坤, 于敏, 李琛

业经营效率, 从企业内部管理角度, 导致企业生产成本黏性的路径分别为调整成本、管理乐观预期与管理代理问题。较高的调整成本、管理乐观预期与管理代理问题, 都将导致企业存在较高的成本黏性。进而使得企业在业绩表现、经营管理各方面都受到较大的限制。我国资本市场发展处于起步阶段时, 由于较为完善的监管机制与相关法律法规, 资本市场的信息环境较为薄弱——相比发达国家资本市场, 透明度与信息传递效率都有待提高。这一状况恰恰为管理乐观预期、掩盖机会主义行为提供了较大便利。如今得益于我国资本市场一系列开放政策、政府部门、媒体、中介机构以及投资者的关注推动了我国资本市场信息环境的改善。根据

主行为极为有效。笔者通过分析上海证券交所相关数据发现, 此种抑制效果在私下同样适用——黏性的系数为负水平上显著。即机制的公司成本从信息透明度的反映体现道德风险, 且在10%的显著性参与“沪港通”在信息透明度的抑制作用行为的空间。

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EFFECTIVE IMPLEMENTATION OF FP&A IN SMES

FP&A如何在中小企业深化落地?

祝睿

中国中小企业可通过五条路径来充分发挥FP&A的作用。

我的志愿服务之旅

VOLUNTEERISM BLOSSOMS IN CHINA

曹世敏, 博士, CMA

段家奇, 译, 邵晓斌



我与IMA

与英国管理会计师协会(IMA)的不解之缘源于2010年, 彼时我在攻读会计硕士学位期间, 开始了我的教学生涯。我以学术代表身份加入了当地的Northwest Keystone分会理事会, 与分会理事会其他成员(他们都是当地财务专业人士, 也都是IMA志愿者)一起组织了各式各样的活动, 并在所任教的大学推广“IMA与CMA”(美国注册管理会计师)认证。我的记忆将与专业人士和在校学生进行那些激动人心的交谈, 而每每看到学生们参与IMA相关活动有所成就时, 也会非常开心, 正因为它对IMA有这样的切身体会。我于2014年参加CMA考试, 并成为了一名CMA持证者。如同任何成功的专业组织一样, IMA的未来取决于成员的参与和奉献。特别感谢IMA在中国的办公室成员, 我与IMA的关系更加密切。作为一名“资深”CMA, 我曾参与过许多多场次的活动, 这让我有机会结识专业人士、IMA全球总部代表等互动交流、分享经验。尤其我特别感谢, IMA支持并开发他的职业生涯发展。2015年, IMA拓展首席执行官Jeff Thomson到中国, 为包括我在内的几位IMA成员授予了特别纪念章, 令我终身难忘。

2018年, IMA成立了由10位资深会计教授组成的中国学术顾问委员会, 推动中国服务再上新台阶。随着新冠疫情全球爆发, 但在不到一年的时间里, 我们成功举行了一系列活动, 包括第六届管理会计师教育高峰论坛、走进企业、委员会成员持续教育公益讲座等。毫无疑问, 专业人士志愿服务精神已成为中国一道靓丽的风景线。作为其中的一员, 我深为自豪。这些年来, 我不仅见证了中国青年界人士专业素养的不断提升, 也受到IMA成员的鼓舞, 他们通过我们的志愿服务管理实践, 改善了所在企业的绩效。如同任何成功的专业组织一样, IMA的未来取决于成员的参与和奉献。特别感谢IMA在中国的办公室成员, 我与IMA的关系更加密切。作为一名“资深”CMA, 我曾参与过许多多场次的活动, 这让我有机会结识专业人士、IMA全球总部代表等互动交流、分享经验。尤其我特别感谢, IMA支持并开发他的职业生涯发展。2015年, IMA拓展首席执行官Jeff Thomson到中国, 为包括我在内的几位IMA成员授予了特别纪念章, 令我终身难忘。

曹世敏, 博士, CMA, 中国注册管理会计师协会, 美国管理会计师协会, 中财教育中心主任。联系方式: cshimin@cebu.edu。



Publications 出版物

Book Publication

- IMA has been working hard to increase awareness of the body of knowledge and best practices relevant to management accounting and build its thought leadership through the publication of professional books since its expansion to China, including *Statements on Management Accounting*, *Management Accounting in China*, *IMA Educational Case Journal*, *Innovative Value Scorecard*, and *Management Accounting Glossary*.
- In March 2021, *Cost and Management Accounting* was jointly published by IMA and the Central University of Finance and Economics; the Official Textbook for CMA Certification (Chinese Edition) was reprinted in October 2021 to meet the needs of a growing number of Chinese candidates.

图书出版

- 自进入中国以来，IMA坚持通过出版高质量的管理会计专业图书，推广、普及管理会计的知识体系与最佳实践，并全力塑造思想领导力。多年来相继出版了《管理会计公告》《管理会计在中国》《管理会计师协会教学案例》《创新价值计分卡》《管理会计词典》等多部图书。
- 2021年3月，IMA 联合中央财经大学出版了《成本与管理会计》教材；10月再版了CMA注册管理会计师认证考试中文版官方教材，旨在满足中国读者的学习和备考需求。



Publications 出版物

Statements on Management Accounting (SMAs)

- Statements on Management Accounting (SMAs) are authoritative publications that cover a broad range of topics and best practices that provide helpful guidance for the management to build a logical thinking framework for business operations and improve their judgement.
- Cooperated with BNAI, SMAs book series was first published in 2012. In June 2020, IMA launched a new series of SMAs. The series includes 23 SMAs issued from 2009 to 2019, and a team of experts from the Shanghai National Accounting Institute was invited to comment on each SMA based on the current situation of management accounting in China.



《管理会计公告》系列图书

- 管理会计公告涵盖了管理会计领域的各项实务及专题，对企业管理人员建立商业逻辑思维框架、提升商业判断力具有很好的借鉴意义。
- 继2012年IMA首次与北京国家会计学院合作翻译出版《管理会计公告》系列图书后，2020年6月，IMA再次推出了新版《管理会计公告》系列丛书。该系列包括2009-2019年IMA发布的23篇公告，同时特邀上海国家会计学院专家团队结合我国管理会计现状为每篇公告撰写评论。



Publications 出版物

Strategic Finance Magazine

- IMA's award-winning Strategic Finance (SF) magazine reflects latest trends and best practices worldwide in management accounting
- SF Chinese bi-monthly edition was introduced in 2017, which combines both translated articles and local content relevant to the development of the profession in China.



《战略财务》杂志

- 《战略财务》是IMA协会旗舰出版物，也是美国获奖刊物，其内容涵盖了国际管理会计的最新趋势和最佳实践。
- 《战略财务》中文版双月刊于2017年推出。除翻译原版内容外，还增加了国内管理会计实践、高端财务人士访谈、理论探讨等更有针对性的本土栏目，旨在助力管理会计在中国的进一步发展。



Publications 出版物

SF Mini Program

- IMA launched <Strategic Finance> WeChat mini program in April 2020.
- This program facilitate online reading with rich content, various format including audio and video, as well as supporting more engagement function.
- The SF Mini Program has successfully generated over 80,000 view counts during FY2020-2021
- More local contents will be developed and presented on this platform to showcase IMA's rich resources and thought leadership.

《战略财务》小程序

- IMA于2020年4月推出《战略财务》杂志微信小程序。
- 该小程序支持线上阅读，涵盖包括文字、声音、视频等多种形式的丰富内容，并支持更多互动功能。
- 在2020-2021财年，《战略财务》小程序全年累计阅读量达到8万余次。
- 未来将在该平台开发更多内容，展现IMA丰富的资源及思想领导力。



危机时期的战略规划

SF 2021年第4期



一凡Yifan610

2021年11月25日正在战略财务上阅读这篇文章

为什么是“经济增加值”？

暨南大学会计学系教授、博士生导师胡玉明认为，在当今金融社会，经济增加值是比利润更能反映企业真实价值创造情况的指标。



长按小程序码
进入战略财务阅读全文



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The CMA Community: Making a
Difference

打造CMA专业交流及提升平台

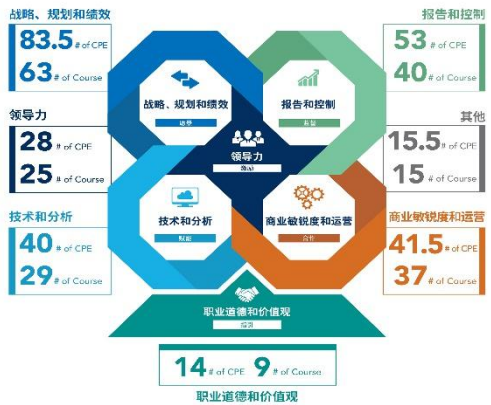
Bilingual Continuing Professional Education (CPE)

中英双语持续专业教育

IMA headquarters and the IMA China team have been working on various bilingual CPE courses development and promoting.

IMA总部及IMA中国团队致力于打造丰富的持续教育课程:

- Chinese Learning Management System (LMS) provides a complete end-to-end Chinese language experience. Courses on LMS covers 6 domains in IMA's <Management Accounting Competency Framework> with various high-quality content. Up until Nov 2021, there are **210+ Chinese CPE courses with 270+ CPE credits** available on LMS.
- IMA管理会计在线学习平台课程全面覆盖IMA《管理会计能力素质框架》中的六个能力类别，持续打造内容丰富的精品课程。截止到目前该平台上包括**210余门**持续教育课程，提供**270余个**持续教育学分（CPE）。
- Through self developing courses by IMA, translating English courses from U.S., purchasing courses from course providers and Tik Tok educational address, IMA continues to provide various high-quality online and offline CPE educational offerings.
- IMA通过自主开发、翻译美国英文原版课程、购买课程以及官方教育抖音号等方式，为管理会计学习者提供多种高质量的在线及线下教育服务。



育课程

会计师协会 (IMA) CMA考生及持证者专享系列课程教育学分, 保持证书的有效性。

IMA

课程为购买者提供一整年的学习权限, 畅享CMA考生也涵盖战略管理和重点行业议题。IMA为您提供前沿以及新推出的在线研讨会。

课程名称

CMA official educational address on Tik Tok
CMA官方持续教育抖音号

1	IMA精品课 新课《财务共享模式创新与应用实践》 查看详情
2	学术论理——知名学者公益课堂 查看详情
3	国际前沿 查看详情
4	实操论剑 查看详情
5	职场论道 查看详情



4D leadership workshop
4D 领导力沙龙

Bilingual Continuing Professional Education (CPE)

中英双语持续专业教育

IMA podcasts was launched in 2020, covering hot topics in the accounting and financial filed, inviting industry experts to share their latest insights on accounting and finance, helping management accounting learners to access global information, learn knowledge and improve their professional competency in a flexible and convenient way.

IMA播客于2020年3月正式上线，涵盖会计和金融圈的热点资讯，邀请行业专家分享关于会计和财务的最新观点和见解，助力管理会计学习者以灵活便捷的方式获取资讯、学习知识、提高职业技能。



IMA管理会计英文播客系列

欢迎来到“IMA管理会计英文播客系列”节目，该节目从行业精英和学界专家的角度，深度解析财务和会计发展的前沿话题，全面探讨管理会计发展趋势。

聚焦科技赋能 助力分析提升

欢迎访问IMA科技和分析教育资源中心！我们聚焦会计和财务领域关键性技术，关注数据分析决策最新趋势。从持续教育课程到研究成果，IMA为您提供最具相关性的资源组合，满足您的专业提升需求。

Launched in 2020, IMA Technology and Analysis Center focuses on key technologies in the areas of accounting and finance, covering broad range of resources in continuing education, research, and publication.

IMA科技与分析中心于2020年3月上线，其聚焦会计和财务领域关键性技术，关注数据分析决策最新趋势，涵盖包括持续教育课程、研究成果、出版物等一些列相关资源。

IMA management accounting master courses

IMA管理会计知名学者公益课堂

- In October 2020, IMA launched a series of CPE courses entitled "**IMA Management Accounting master courses**". The course was delivered by 17 members of the IMA Management Accounting Academic Committee, providing rich knowledge sharing from the perspectives of CFO responsibility and strategy, cost management, industry and finance convergence, capital transformation and listed corporate governance.
- IMA于2020年10月推出《**IMA管理会计知名学者公益课堂**》系列课程。课程由IMA管理会计学术顾问委员会**17**位顾问委员讲授，从**CFO**的职责及战略、成本管理、业财融合、移动互联网视角、资本转型与上市公司治理等多角度提供丰富的知识分享。



Newly technology analytics course and self-developing course based on research report are launched on LMS

最新技术分析课程和研究成果转化课程登陆IMA管理会计在线学习平台



- In order to meet the needs of CMAs in China, one new technology analytics course is introduced --- **<IMA Data Analytics & Visualization Fundamentals Certificate >**. It is localized in Chinese according to the learning habits of Chinese audiences. The courses are available on LMS.



- 为满足中国CMA持证者需求，IMA中国最新引进一门技术分析课程——《**IMA技术与可视化基础课程**》并根据中国持证者学习习惯进行中文本土化，在IMA管理会计在线学习平台上线，供持证者学习。

- In order to demonstrate and disseminate local research results, the 1st research report transformation course is developed--**<Innovation and Application Practice of Finance Sharing Model >**. The course is available on LMS.

- 为更好地展示和扩散本土研究成果，第一门研究报告转化课程---《**财务共享模式创新与应用实践**》开发完成并在学习平台上线。



CMA Elite Clubs

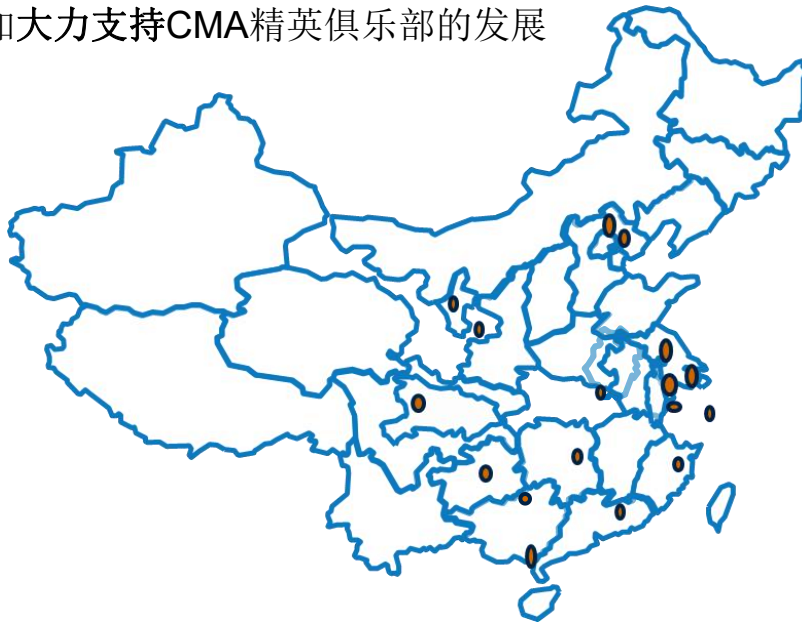
CMA精英俱乐部

- There are **14** CMA Elite Clubs and **2** chapters across China as of Nov 2021.
- We do **APPRECIATE** each and every CMA Elite Club and chapter leader and volunteers' great contribution and commitment.
- IMA has been and will continue to be making every effort to **better service and support** CMA Elite Clubs.

截止到2021年11月，全中国共有**14个CMA精英俱乐部**和**2个分会**。

由衷感谢每一位CMA精英俱乐部和分会的领导及志愿者的支持和投入

IMA将继续并更加大力支持CMA精英俱乐部的发展



The IMA logo, consisting of the letters 'ima' in a white, lowercase, sans-serif font on a dark blue rectangular background.



Chengdu CMA Elite Club event, July 2018
2018年7月成都CMA精英俱乐部活动



Shaanxi CMA Elite Club event, May 2018
2018年5月陕西CMA精英俱乐部活动



IMA Hongkong chapter establishing ceremony, 2019
2019 IMA香港分会成立活动

CMA Elite Clubs

CMA精英俱乐部

IMA Switzerland Chapter and Nanjing CMA Elite co-organized a webinar entitled

“Global Insights: Navigating Change”

IMA瑞士分会和南京CMA精英俱乐部共同举办线上讲座：寰宇视野：拥抱变革

- On Sep 15, 2020, Switzerland Chapter and Nanjing Elite co-organized a webinar entitled “Global Insights: Navigating Change”, which was the 1st cross regions chapter/elite club webinar.
- Academic and practices fields leaders shared experiences and insights.
- It received 268 attendees.
- 2020年9月5日，瑞士分会和南京精英俱乐部共同举办题为“寰宇视野、拥抱变革”的在线讲座，这是第一次跨区域举办的在线讲座。
- 来自学术和实务届嘉宾分享相关领域的经验和洞见。
- 在线共吸引268位观众实时收看。



Marco Ottili
Director

IMA Switzerland Chapter
财务总监；IMA瑞士分会董事



Thorsten Feix
Professor

Augsberg University of Applied Sciences
德国最大的应用科技大学教授，专注企业收购兼并和公司融资，并在哈佛大学负责全球收购课程；德国联邦收购兼并协会董事会成员



Jude Zhu
Chair

CMA Nanjing Elite Club
全球董事；CMA南京精英俱乐部发起人



Marshall Ma
Co-founder and CEO
EasyFinance

马爽 - 安越咨询创始合伙人及总经理；中国知名管理会计专家；安越中欧奖学金发起人



CMA Elite Clubs

CMA精英俱乐部



Transformation From Finance to Management Consultant.

Chengdu CMA Elite Club, 24 Jan 2021.

2021年1月24日，成都俱乐部沙龙活动：如何实现财务转型“管理咨询顾问”。



Seminar on Value Investment Practice.
Shenzhen CMA Elite Club, 23 May 2021

2021年5月23日，CMA深圳精英俱乐部举办“价值投资实践研讨会”，近一百位CMA持证者及考生参加。



Career Update for Finance.
Nanjing CMA Elite Club,
20 June 2021.

2021年6月20日，CMA南京精英俱乐部沙龙活动“财务人的职场修炼”。



Corporate Tax Planning Strategy.
Hangzhou CMA Elite Club,
June 2021.

2021年6月尾旬，CMA杭州精英俱乐部“企业税收筹划策略”主题活动。



Online Event Talk on CMA.
Tianjin CMA Elite Club, 17 Nov
2021

2021年11月17日，天津俱乐部精英俱乐部面向全国CMA举办线上分享活动“CMA漫谈”。

CMA elite club delegation to ACE100

CMA精英俱乐部代表团赴美参与IMA百年庆典

- Organized CMA elite club leaders to be part of IMA 100th year anniversary celebration in San Diego this June 2019;
- 组织了CMA精英俱乐部领导代表团，参与2019年6月于美国圣迭戈举办的IMA 100周年庆典；
- CMA club leaders had intensive communications with CMAs from other regions.
- CMA精英俱乐部领导与其它区域的CMA们进行了广泛的交流。



CMAAs gathered at IMA new local offices

区域CMA代表在IMA区域新办公室中交流互动

- On October 26, 2019, CMA from Chengdu gathered to witness the establishment of IMA Chengdu office and did comprehensive communication.
- 2019年10月26日，成都地区CMA代表共同见证IMA成都办公室成立，并进行了热烈的交流沟通。
- On October 28, 2019, CMA from east China area visited IMA Shanghai new office and congratulated Shanghai office relocation, during which CMAAs had active interaction.
- 2019年10月28日，上海地区CMA代表共贺IMA上海办公室乔迁，并展开了积极友好的互动交流。



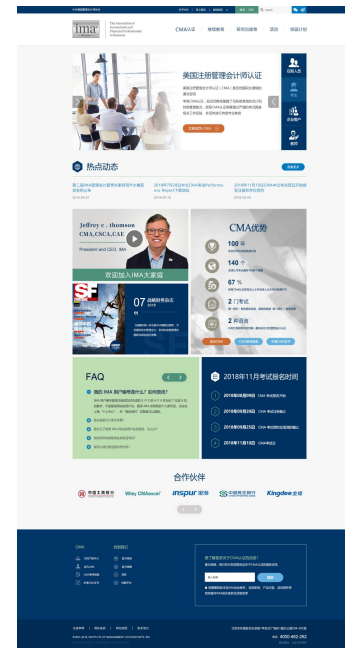
Launched New version of IMA China website and new CMA WeChat subscription account 全新的IMA中文官网及CMA订阅号上线

New China website was launched in July, 2019

- Enriched content
- Organized structure
- User-friendly interface
- Efficient user experience

IMA全新的中文官网于2019年7月正式上线

- 更丰富的内容
- 更合理的布局
- 更友好的界面
- 更便捷的体验



New version of IMA
China website
IMA中文官网

New CMA
WeChat
subscription
account
CMA订阅号



New CMA WeChat subscription account go live in March, 2020

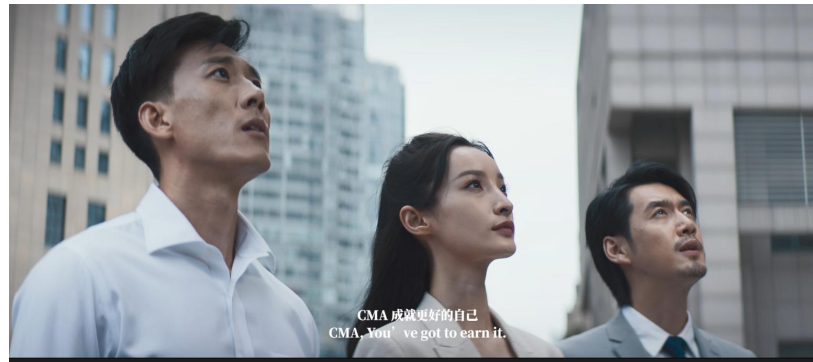
- Frequent engagement
- Trendy global insights and trends
- Local best practices

全新的CMA订阅号于2020年3月正式上线

- 更频繁的读者互动
- 融合全球视野与热点资讯
- 本土优秀案例分享



Launched CMA Chinese commercial and Campaign 2019-2020年中文CMA广告及宣传项目启动



CMA Chinese commercial and Campaign is launched on Sep 14, 2020

- 4 commercials and related extensions have been promoted in multiple platforms;
- Received positive feedback from and audiences;
- After two weeks since it's launched, commercials received 3.1 million view times.

CMA中文广告及宣传项目于2020年9月14日启动

- 4支品牌广告及周边物料在多个平台同步上线;
- 收到了合作伙伴及观众的好评;
- 上线两周后的广告浏览量达到310万。



Launched CMA Chinese commercial and Campaign

2019-2020年中文CMA广告及宣传项目启动



- As part of integrated CMA campaign, a comprehensive landing page was developed, along with 11 corporate leaders interview, 10 professor's interview, 10 CMAs' story which converted to infographic, short video, and SF print ads. They come together showcase and deliver the value of CMA.

- 作为年度CMA整合宣传项目的一部分, 新开发CMA页面、11支企业财务高管采访视频、10支知名高校教授采访视频、10位CMA故事并转换成长图、小视频、《战略财务》杂志内页等形; 多角度展现及传递CMA价值。

Launched CMA Chinese commercial and Campaign 2020-2021年中文CMA广告及宣传项目启动



Strategy meeting
(in a State-Owned-Corporate)



2020-2021 CMA Chinese commercial and Campaign is launched on Sep 9, 2021

- 4 commercials and related extensions have been promoted in multiple platforms;
- Received positive feedback from and audiences;
- From Sep 9th to Nov 30th, it received 13M view times, driving 770K Hits to CMA landing page. .



Interview
(in a multi-national corporate)



2020-2021 CMA中文广告及宣传项目于2021年9月9日启动

- 4支品牌广告及周边物料在多个平台同步上线;
- 收到了合作伙伴及观众的好评;
- 上线后至11月30日, 累计浏览量达到1300万, 累计着陆页浏览量达77万。



Finance & Business integration
(in a tech company)



New programs in technology and analytics

技术和分析领域的新项目

As one of IMA's 4 global strategies, new technology and analytics is a key area where we are investing and exploring.

➤ Updated CMA exam:

Updated exam effective January 1, 2020, with a section of "Technology and Analytics" featured.

➤ Research:

"Management Accounting Competencies: Fit for Purpose in a Digital Age?" (2018)

"Implementation of Advanced Analytics Improves Corporate Performance" (2019).

"The Data Analytics implementation Journey in Business and Finance" (2019)

"The Impact of Big Data on Finance Now and in the Future" (2020)

➤ Publications

Key related articles published in Strategic Finance

➤ Education programs

Webinars addressing this area to enable cutting-edge CPE.

IMA Data Analytics & Visualization Fundamentals Certificate™.

新技术和分析是我们投入和探索的重点领域，这反映在以下几个方面。

➤ 更新CMA考试大纲：2020年新考纲增加“技术及分析”部分

➤ 研究报告

✓ 《管理会计能力素质：是否适应数字化时代？》（2018）

✓ 《先进分析能力提升企业业绩》（2019）

✓ 《商业和财务领域的数据分析实施过程》（2019）

✓ 《大数据对财务的影响 -- 现状及未来展望》（2020）

➤ 出版物：重要相关文章发表在《战略财务》

➤ 教育课程：

✓ IMA发布了很多和该领域相关的前沿在线研讨会作为持续教育课程

✓ 数据分析与可视化技术课程



Building Bridges and Nurturing
Relationships

搭建沟通与合作的桥梁

Back in 2006...

回溯到2006年

In May 2006, at the invitation of the Ministry of Commerce, IMA conducted costing practice research and published the book of *Management Accounting in China*.

2006年5月，IMA应商务部邀请，开展成本实践研究，并出版《管理会计在中国》一书



Government delegations to IMA headquarters

政府代表团访问IMA总部

- In 2014 and 2015, the Ministry of Finance of China organized a delegation visit IMA headquarters.
- 2014年和2015年，中国财政部组织代表团访问IMA总部，双方就管理会计的专业课题进行了全面沟通和广泛讨论。
- In 2018, the delegation of Shandong SASAC visited IMA headquarters and participated the COSO workshop.
- 2018年，山东省国资委代表团访问IMA总部，并参加了由IMA主办的COSO研讨会，双方就管理会计专业话题深入交流意见分享经验。



Comments on China MOF Management Accounting Application draft Guidelines

就《管理会计应用指引》发表相关看法



The Association of
Accountants and
Financial Professionals
in Business

关于就《管理会计应用指引第100号——战略管理》等22项管理会计应用指引征求意见函的回复

尊敬的中华人民共和国财政部部长：

美国管理会计师协会（IMA®）此番来信旨在针对关于就《管理会计应用指引第100号——战略管理》等22项管理会计应用指引征求意见函分享我协会相关看法。IMA是全球领先的国际管理会计师组织，拥有超过85000名CMA考生及持证者，遍布工商界、学术界、政府部门以及各类非营利机构内部，这些财务专业人士凭借其先进的财务理念、出色的战略思维、卓越的管理能力和严格的道德准则，不断推进企业和机构整体绩效的提升。自进入中国以来，IMA发展迅速，已经成为凝聚财务高管和企业决策制定者的高端平台。

我们大力支持财政部通过制定《管理会计应用指引》促进管理会计实践的做法。经过仔细研究，我们基于全球最佳实践给出相关建议，并希望能够通过这种友好的方式围绕管理会计的推广工作进行交流。

复函中给出了我们对关于就《管理会计应用指引第100号——战略管理》等22项管理会计应用指引征求意见函中所提十二个问题的回复。更多详细建议请参见所附资料。

我们非常感谢有此机会在本函中给出我们的建议，并期待有适当机会能与您就相关话题展开更深入的交流。

此致

敬礼

瑞夫·劳森 (Raef Lawson)
IMA 研究和政策部副总裁

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- IMA provides comments on the Ministry of Finance's management accounting application draft guidelines. The guideline is about the *No. 100 Managerial Accounting Application Guide – Strategic Management* along with other 22 managerial accounting application guides.
- IMA就财政部《管理会计应用指引第100号——战略管理》等22项管理会计应用指引征求意见函分享相关看法。
- IMA global research team completed the comments to 2019 MOF Guideline on Cost Accounting.
- 针对2019年财政部成本实践指南，IMA全球研究团队进行研读并撰写了相关看法。



Active engagement with provincial government 与省级政府部门保持积极沟通



Visit to Shenzhen Municipal Government 拜访深圳市人民政府

- Jeffrey Thomson, President and CEO of IMA meet with Mr. Wang Gang, Deputy Secretary General on June 3, 2019.
- 2019年6月3日，IMA总裁及首席执行官Jeffrey Thomson 先生拜访深圳市人民政府王刚副秘书长。
- Winning the strategic support form government and securing IMA's long-term development in this region.
- 赢得当地政府的战略支持，确保IMA在该地区的长期发展。
- Following up with Shenzhen Human Resources and Social Security Bureau to discuss include CMA into local talent incentive policies.
- 跟进深圳市人力资源和社会保障局，讨论将CMA纳入当地人才激励政策。

Active engagement with provincial government 与省级政府部门保持积极沟通



Visit to Shanghai Municipal Government 拜访上海市政府

- Jeffrey Thomson, President and CEO of IMA meet with Mr. Wu Qing, standing committee member and deputy mayor of Shanghai municipal committee and other government officials, Oct 28, 2019.
- 2019年10月28日，IMA总裁兼首席执行官Jeffrey Thomson先生拜会了上海市委常委、副市长吴清先生等政府官员。
- Vice Mayor Wu acknowledged IMA's achievements in promoting the development of management accounting and welcomed IMA's contribution to the development of financial and accounting professionals in Shanghai.
- 吴清副市长肯定了IMA在推动管理会计发展做出的成绩，并欢迎IMA未来在上海与相关部门共同为金融及会计领域专业人才培养做出贡献。



Active engagement with provincial government 与省级政府部门保持积极沟通



Engagement with Hubei Provincial Government and Wuhan Municipal Government 与湖北省政府及湖北省政府积极互动

- From March 23 to 24, 2021, IMA participated in the economic and trade negotiation of 2021 'Meeting to appreciate Cherry blossoms in Spring' and the World Top 500 Dialogue in Hubei. Government officials of Hubei province met with the participants.
- 2021年3月23日-24日，IMA参加2021‘相约春天赏樱花’经贸洽谈暨世界500强对话湖北活动。湖北省领导会见了与会嘉宾。
- On March 23, 2021, IMA participated in the dialogue with Yang Jun, vice Mayor of Wuhan city.
- 2021年3月23日，IMA参加“携手并肩，共谋发展——2021美资企业专场活动”对话武汉市副市长杨军。



IMA officially established an overseas NGO representative office in Shanghai

IMA在上海正式设立境外非政府组织代表处



In accordance with <The Law of the People's Republic of China on the Administration of Activities of Overseas Nongovernmental Organizations in the Mainland of China >, IMA has officially established an overseas NGO representative office in Shanghai in August, 2020. IMA was the first foreign NGO in accounting to be approved and registered under the law.



2020年8月，IMA依照《中华人民共和国境外非政府组织境内活动管理法》在上海正式设立了境外非政府组织代表处。IMA也是首个设立境外非政府组织代表处的国际财会组织。

Active engagement with local government 与各地方政府部门保持积极沟通



MOU and joint event with Sichuan Tianfu New Area Management Committee and signed MOU.
与四川天府新区管理委员会联合举办活动并签署战略合作备忘录

- On April 9, 2021, IMA and Sichuan Tianfu New Area Management Committee successfully held the "Embrace Change, Seize the Momentum forward -- 2021 Tianfu Financial Talents Summit and IMA Management Accounting Practice Summit" in Chengdu, and signed MOU.
- 2021年4月9日, 美国管理会计师协会 (IMA) 与四川天府新区管理委员会在成都成功举办了“拥抱变革, 驭势前行——2021天府金融英才高峰论坛暨IMA管理会计实践峰会”, 并签署了战略合作备忘录。
- 共同成立IMA管理会计 (西南) 国际交流中心
- Establishing IMA Management Accounting (southwest) International Communication Center

Active engagement with local government 与各地方政府部门保持积极沟通



- May 29, 2021, IMA held joint event with Ningbo Human Resources and Social Security Bureau on “China's economic development from the perspective of finance and taxation”
- 2021年5月29日，IMA与宁波市人力资源和社会保障局共同举办“财税视角看中国经济发展”的研讨活动



- On July 25, 2021, under the guidance of financial department of Sichuan province and Chongqing city finance bureau guidance, IMA and Chengdu ASC jointly supported Sichuan province ASC and Chongqing ASC on the organization of event with the topic of “Summit on intelligence finance enables enterprises to develop with high quality”
- 2021年7月25日，由四川省财政厅和重庆市财政局指导，IMA协会、成都市会计学会协助四川省会计学会和重庆市会计学会共同举办的首届成渝地区双城经济圈新时代会计发展——“数智财务赋能企业高质量发展高峰论坛”在成都隆重举行

Professional bridging between China and US

积极促进中美之间的专业交流



- On April 14th, IMA participated in the workshop organized by U.S. Consulate General in Guangzhou and shared speech on Risk Management.
- 2021年4月14日，IMA参与广州总领事馆研讨会，并做关于风险管理的分享。

- On May 18, 2021, Richard Li, VP and Chief Representative of IMA in China, attended and delivered a speech at China (Chongqing) --American Financial Roundtable
- 2021年5月18日，IMA管理会计师协会副总裁、中国区首席代表李刚，参加中国（重庆）--美国金融圆桌会并发言





Cooperation with Beijing National Accounting Institute (BNAI) 与北京国家会计学院合作

- IMA and BNAI have been maintaining close communication for many years and actively exploring collaboration opportunities from various aspects. The two parties jointly launched a new continuing education project, establishing an "IMA education online learning webpage" on BNAI's website.
- IMA与北国会多年来始终保持密切沟通，并积极从多方面寻求合作契机。日前，双方联合推出持续教育新项目，在北国会官网开设“IMA教育在线学习专区”，共同推出精品管理会计课程，迈出战略合作新一步。
- This project mainly involves the cooperation in the online course of management accounting. The two parties will make full use of the resource advantages, and jointly develop and release high quality management accounting courses.
- 此次项目主要涉及管理会计在线课程方面的合作，双方将充分利用在会计理论和实务方面的资源优势，共同开发并在专区发布数十门精品管理会计课程。




[首页](#) | [课程中心](#)

热门课程

 战略管理 0人 1人 试听	 财务报表中的纳税风险识别与... 0人 1人 试听	 做正确的事--管理会计职业道德 0人 0人 试听	 区块链基础知识与应用 0人 0人 试听	 CFO谈管理会计——为什么要... 0人 3人 试听
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最新课程

 上市公司财务分析与估值 0人 1人 试听	 解读COSO: 企业风险管理与... 0人 1人 试听	 报告商业智能数据科学 0人 0人 试听	 做一个睿智的业务合作伙伴 0人 1人 试听	 CFO谈管理会计-成功商业模式... 0人 0人 试听
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Cooperation with Beijing National Accounting Institute (BNAI) 与北京国家会计学院合作

- On May 29, 2020, IMA and BNAI jointly organized on digital forum, in which senior leaders from government and corporates were invited to share best practices and experience on finance and management accounting.
- 2020年5月29日，IMA与北国会联合推出管理会计中国行-抗疫特辑在线论坛。邀请政府及企业界专家领导分享相关领域的洞见和先进经验。



- On June 10, 2021, IMA and BNAI jointly held the 2020 CMA Scholarship Award Ceremony and Management Accounting Lecture Hall event.
- 2021年6月10日，IMA与北京国家会计学院联合举办了2020年度CMA奖学金颁奖仪式暨管理会计大讲堂活动。

Cooperation with Shanghai National Accounting Institute (SNAI) 与上海国家会计学院合作

- IMA and SNAI signed MOU in 2016, which covers various areas of cooperation including joint research, collaboration on workshop, Scholarship to Asia Finance and Development Institute international students' program, as well as translation and publication of *Statement of Management Accounting*.
- 2016年3月，IMA与上海国家会计学院 签署了合作备忘录，内容涵盖了联合研究、专业研讨会合作、亚洲金融与发展学院国际学生奖学金项目、新版《管理会计公告》的联合翻译与发布等多个领域。
- Since 2016, the two parties have had collaborating on enhancing the profession.
- 自2016年起，双方开始了广泛深入的合作。
- In 2019, the new version of *Statement of Management Accounting*, co-translated by the SNAI, was officially released at the 7th SNAI management accounting forum.
- 2019年11月，由上海国家会计学院共同参与翻译的新版《管理会计公告》在第七届上海国家会计学院管理会计论坛中正式发布。



签署合作备忘录,2016年3月
MOU signing between IMA and SNAI,
March, 2016



2019年5月IMA拜访上海国家会计学院并举
办专业讲座
Visiting SNAI and conducting professional
lecture in SNAI, May, 2019



2019年11月，共同发布新版《管理会计公告》
Launching of new version *Statement of
Management Accounting*, 2019

Cooperation with Shanghai National Accounting Institute (SNAI) 与上海国家会计学院合作



- Oct 17, 2021, being one of the sponsoring member, IMA attended the unveiling and researcher conference of the Intelligent Finance Research Institute of the SNAI.



- 2021年10月17日，IMA作为发起成员单位之一，出席上海国家会计学院智能财务研究院揭牌暨研究人员大会。

Cooperation with Xiamen National Accounting Institute (XNAI) 与厦门国家会计学院合作

- IMA and XNAI signed MOU in 2019, which covers various areas of cooperation including joint research, collaboration on workshop, etc.
- 2019年，IMA与上海国家会计学院 签署了合作备忘录，内涵盖了联合研究、专业研讨会合作等多个领域。
- 2019年，双方启动第一次联合举办专业论坛，得到了业界广泛好评。
- In 2019, IMA and XNAI started to co-organized the 1st professional workshop, which win good feedback from audience and industry.



2019年11月15日签署合作备忘录
MOU signing between IMA and XNAI,
Nov 15, 2019



2019年11月15日IMA与厦门国家会计学院
联合举办专业讲座
Conference co-organized by IMA and
XNAI,
Nov 15, 2019



Cooperation with Xiamen National Accounting Institute (XNAI) 与厦门国家会计学院合作

- On October 23, 2020, XNAI held the CMA Scholarship award ceremony and IMA Campus Management Accounting Case Competition promotion activity.
- 2020年10月23日，厦门国家会计学院举行CMA奖学金颁奖仪式暨IMA校园管理会计案例大赛宣传活动。



Engagement with associations / institutes 与专业学会、协会保持紧密沟通

Visiting China Institute of Certified Public Accountants (CICPA), 2019

拜访中国注册会计师协会（2019）



- On May 8, 2019, Jeffrey Thomson, President and CEO of IMA meet with Mingji ZHAO, the Chairman of CICPA;
- IMA总裁兼首席执行官Jeffrey Thomson先生于2019年5月8日拜会中国注册会计师协会会长赵鸣骥先生;
- Comprehensive communication on corporates' practice, on management accounting, and future collaboration on international exchange.
- 双方就管理会计在全球及中国企业的应用情况、未来增进国际间交流合作、促进会计师专业能力提升等话题达成了友好共识。
- Following up: on behalf of Jeff, sending a letter of congratulation to their new general secretary- Mr. Shu Huihao in June. Mr. Shu expressed his willing to deep mutual collaboration in his reply letter.
- 会后跟进：向新任秘书长舒惠好先生致函，舒惠好秘书长在回函中表示愿与IMA在未来深入合作。
- Keeping on communicating with Mr. Tang Jianhua, Director of Standards at CICPA and pushing them to restart the research project which was set by their last leadership team.
- 继续与中注协标准部主任唐建华先生沟通，推动重启前任领导团队制定的研究项目。

http://www.cicpa.org.cn/BNIE/201905/t20190510_51919.html

Engagement with associations / institutes 与专业学会、协会保持紧密沟通



Visiting China Association of Chief Financial Officers (CACFO), 2019

拜访中国注册会计师协会 (2019)

- On May 10, 2019, Jeffrey Thomson, President and CEO of IMA meet with Hongwei LIU, the Chairwoman of CACFO
- IMA总裁兼首席执行官Jeffrey Thomson先生于2019年5月10日拜会中国注册会计师协会刘红薇会长；
- Reaching agreement on future collaboration in areas of research, conference, high-end training, to jointly contribute to the development of management accounting profession.
- 双方就学术研究、论坛活动和高端培训等方面的进一步合作充分交换了意见，并在共同推动管理会计发展方面达成了共识。

http://www.cacfo.com/index.php/index/News/news_show/id/24370



- Follow up: discussing with CACFO on the possibility to be the supporting organization of the first English edition of China <China Management Accounting Review> which is the most influential magazine on management accounting in China and owned by CACFO.
- 会后跟进：与中国注册会计师协会探讨《中国管理会计》英文版的支持机构的可能性。

- On October 22, 2021, IMA Vice President and Chief Representative in China Richard Li visited CACFO and had a full exchange of views with the Chairwoman Liu Hongwei on multi-field cooperation and future development.
- 2021年10月22日，IMA副总裁、中国区首席代表李刚一行拜访中国注册会计师协会，与刘红薇会长就多领域合作及未来发展进行充分交流。

Engagement with associations / institutes 与专业学会、协会保持紧密沟通

Visiting Accounting Society of China (ASC), 2019 拜访中国会计学会（2019）

- On May 8, 2019, Jeffrey Thomson, President and CEO of IMA meet with Min YANG, the Secretary General of ASC
- IMA总裁兼首席执行官Jeffrey Thomson先生于2019年5月8日拜会了中国会计学会副会长杨敏女士。
- Follow up: IMA sponsored ASC 2019 annual conference on July 13-14. There were more than 500 attendee and IMA had a booth at the venue.
- 会后跟进：IMA赞助参与了中国会计学会于2019年7月13-14日举行的年会，约500位与会者参与该活动。

ima®



http://www.asc.net.cn/News/NewsContent.aspx?NewsID=6559cef5-c791-4692-91e5-8cdad8866924&PageCode=MENU_AO

Engagement with associations / institutes 与专业学会、协会保持紧密沟通

Visiting and signing MOU with China Electricity Council (CEC), May 8, 2019

拜访中国电力企业联合会并签署战略合作备忘录（2019）

- On May 8, 2019, Jeffrey Thomson, President and CEO of IMA meet with Weichun SHEN, the Deputy Secretary General of CEC;
- IMA总裁兼首席执行官Jeffrey Thomson先生于2019年5月8日拜会中国电力企业联合会副秘书长沈维春;
- Sign MOU with CEC, on setting up information exchange platform including professional qualification, training, conference, and mutual visits.
- 双方签署战略合作备忘录，在国际专业资质合作、培训、专业活动与相关研究等方面将开展深入合作。



Signing MOU with China Chamber of International Commerce (2020)

与中国国际商会签署战略合作备忘录（2020）

- Through this collaboration, IMA and CCIOC will both play positive roles in enhancing the management level of enterprises, strengthening the cultivation management talents, and promoting the exchange of Chinese and international best practices and experiences, in April 2020.
- 2020年4月，双方通过此举对提升企业管理水平，加强国际化、复合型优秀管理人才的培养，促进中外经贸合作领域国际标准、管理经验交流发挥积极的推动作用。

Visiting and signing MOU with China International Contractor Association (CHINCA), August 13, 2019

拜访中国对外承包工程商会并签署战略合作备忘录（2019）

- On August 13, 2019, Doreen Remmen, Senior Vice President of Operations and Chief Financial Officer of IMA meet with Xiuming XIN, the Vice Chairman of CHINCA;
- IMA运营高级副总裁兼首席财务官Doreen Remmen女士于2019年8月13日拜会中国对外承包工程商会副会长辛晓明先生;
- Sign MOU with CHINCA, on establishing a resources sharing platform, including training, conference, research and mutual visits.
- 签署战略合作备忘录，内容包括开展培训、共同举办研讨会、研究、高层互访等项目。



Engagement with associations / institutes 与专业学会、协会保持紧密沟通



Visiting and signing MOU Shanghai Pudong Association of Enterprises with Foreign Investment, June of 2019

IMA与上海浦东外商投资企业协会达成战略合作伙伴关系
(2019年6月15日)

- Richard LI, Vice President of IMA meet with Yaquan FAN, the Vice Chairman of Shanghai Pudong Association of Enterprises with Foreign Investment;
- IMA美国管理会计师协会副总裁兼中国区首席代表李刚先生拜会上海浦东外商投资企业协会常务副会长范亚泉先生;
- Sign MOU, on establishing a resources sharing platform, including training, conference, and mutual visits.
- 签署战略合作备忘录，内容包括开展培训、共同举办研讨会、高层互访等项目。



Engagement with associations / institutes 与专业学会、协会保持紧密沟通

- Oct 26, 2021, IMA signed MOU with **Shanghai Pudong Financial Promotion Association**.
- 2021年10月26日，IMA合作伙伴上海浦东金融促进会战略合作伙伴签约。



- May 26, 2021, IMA and **Shanghai Foreign Investment Association** held joint event on “profit analysis and effectively support enterprise decision-making”.
- 2021年5月26日，IMA携手上海浦东总部经济共享服务中心共同举办主题为“更精准合理的盈利分析，有效支持企业决策”的管理会计实战技巧研讨会。

Engagement with associations / institutes 与专业学会、协会保持紧密沟通

- On November 14, 2020, IMA and **PMI(China)** jointly organized a seminar "When Project Management meets Management Accounting" which was jointly organized by PMI(China) Chengdu Community and CMA Chengdu Elite Club.
- 2020年11月14日，IMA联合**PMI(中国)**，由PMI(中国)成都社区携手CMA成都精英俱乐部共同承办的研讨活动“当项目管理遇上管理会计”。



- On August 19, 2021, IMA and **Chuanshang innovation and Development Association** jointly hosted a lecture on "Corporate Tax Risk Prevention and Control and Planning under the Trend of The Fourth Phase of Golden Tax".
- 2021年8月19日，IMA与川商创新发展商会共同主办“金税四期趋势下企业税务风险防控与筹划”专题讲座。

IMA's Higher Education Endorsement Program

IMA高等教育认可计划

- The only certification in managerial accounting education in the world.
- IMA管理会计课程认证计划是国际上唯一一个管理会计教育领域的质量认证。
- Until 2018, IMA endorsed **13 universities** include Peking University, Fudan University, Central University of Finance and Economics, Xi'an Jiaotong University, Xiamen University, and so on.
- 截至2018年，已有包括北京大学、中央财经大学、复旦大学、西安交通大学、厦门大学、等**13所院校**正式加入到国际管理会计教育联盟院校的团队中。



MOU with School of Management, Fudan University

与复旦大学管理学院签署战略合作备忘录

- Sign MOU with School of Management, Fudan University on May 6, 2019;
- 2019年5月6日，与复旦大学管理学院签署战略合作备忘录；
- Based on this MOU, IMA and School of Management of Fudan university will develop collaboration in the areas of research, forum, continuous education, case competition, CMA scholarship, etc.
- 双方将以此为基础，在研究、论坛、持续教育、案例大赛、CMA奖学金等方面展开合作。
- A co-organize a forum on Management accounting and integration of finance and business was conducted in May 2019.
- 双方于2019年五月联合举办了“管理会计业财融合发展高峰论坛暨战略合作签约仪式”。
- Building IMA Book Corner at the library of the school, and delivering CMA scholarship to the university
- 在复旦管理学院打造IMA图书角，并为复旦大学学生提供CMA奖学金。



MOU with Shanghai Advanced Institute of Finance (SAIF) 与上海高级金融学院签署战略合作备忘录



Visiting and signing MOU with Shanghai Advanced Institute of Finance (SAIF) on June 6, 2019

与上海交通大学上海高级金融学院签署战略合作备忘录，2019年6月6日

Meeting with Mr. ZHANG Chun, Dean of SAIF, and signing MOU with Shanghai Advanced Institute of Finance (SAIF)

拜会上海高级金融学院执行院长张春教授



- Conducting seminar around management accounting practices in May 2019.
- 于2019年5月共同举办相关的管理会计研讨会
- Building IMA Book Corner at the library of the school
- 在学院内打造IMA图书角
- Dec.9,2020, jointly held IMA-SAIF MA Series Seminar & CMA Scholarship Award Ceremony.
- 2020年12月9日，IMA携手上海高级金融学院举办系列讲堂暨奖学金颁奖仪式



MOU with School of International Business Administration, Shanghai international studies university

与上海外国语大学国际工商管理学院共同签署了战略合作伙伴关系框架协议



Signing MOU with School of International Business Administration, Shanghai international studies university, April 2020

IMA与上海外国语大学国际工商管理学院共同签署了战略合作伙伴关系框架协议，2020年4月

- The two sides will promote CMA management accounting talent, build the "IMA wisdom city research institute", conduct joint research on management accounting big data, financial innovation, digital transformation, and financial technology and analysis related topics.
- 双方将就推动CMA管理会计人才培养计划、共同打造基于上海市政府城市治理智库功能为目标的“IMA智慧城市研究所”，在管理会计大数据研究、财务与创新关系、数字化转型”及“财务技术与分析等相关课题开展研究及成果发布等合作。



MOU with Shanghai University of Finance and Economics

IMA与上海财经大学会计学院结成战略合作伙伴



Signing MOU Shanghai University of Finance and Economics, June 2020

IMA与上海财经大学会计学院结成战略合作伙伴, 2020年6月



- The two sides will make full use of resources advantages to carry out in-depth cooperation from multiple perspectives in management accounting training, internship counterpart base, forum cooperation, CMA management accounting courses, knowledge dissemination, CPE, and industry-university-research joint research projects.
- 双方将充分利用资源优势, 在管理会计人才培养、实习对口基地、论坛合作、CMA管理会计课程、知识传播、后续教育及产学研共同研究基金项目等方面开展多角度深入合作。
- March and November of 2021, IMA-SUFE jointly held MA Series Seminars.
- 2021年3月及11月, IMA携手上海财经大学共同举办管理会计系列讲堂暨奖学金颁奖仪式



MOU with Southwestern University of Finance and Economics

IMA与西南财经大学结成战略合作伙伴



- On 18 November 2020, IMA signed MOU with Southwestern University of Finance and Economics
- 2020年11月18日，IMA与西南财经大学达成战略合作



- On December 2, 2020, IMA donated books and book Corner to School of Accounting, Tianfu College, Southwestern University of Finance and Economics.
- 2020年12月2日，IMA美国管理会计师协会对西南财经大学天府学院会计学院的图书捐赠暨图书角。

MOU with Jiangxi University of Finance and Economics

IMA与江西财经大学会计学院结成战略合作伙伴



- In November 2020, IMA held the promotion activities in Jiangxi University of Finance and Economics for CMA Scholarship and case competition.
- 2020年11月，IMA举办走进江西财经大学，进行CMA奖学金颁及案例大赛宣传活动
- In Dec of 2020, IMA and Jiangxi University of Finance and Economics signed MOU.
- 2020年12月IMA与江财财经大学会计学院达成战略合作
- On June 5, 2021, Jiangxi Aviation Industry Management Accounting Forum was held jointly with Jiangxi University of Finance and Economics and IMA.
- 2021年6月5日联合江西财经大学举办江西航空业管理会计论坛.



MOU with the School of Economics and Business Administration of Beijing Normal University

IMA与北京师范大学经济与工商管理学院结成战略合作伙伴



- On December 5, 2020, IMA signed MOU with the School of Economics and Business Administration of Beijing Normal University
- 2020年12月5日, 美国管理会计师协会 (IMA) 与北京师范大学经济与工商管理学院达成战略合作



- On June 22, 2021, IMA and the School of Economics and Business Administration of Beijing Normal University jointly organized an online IMA Management Accounting Lecture Series for students on Zhuhai campus
- 2021年6月22日, IMA与北京师范大学经济与工商管理学院共同为珠海校区学生举办了在线“IMA管理会计系列讲堂”活动
- On June 29, 2021, IMA and The School of Economics and Business Administration of Beijing Normal University jointly held the CMA Scholarship Award ceremony and management Accounting Lecture series at the School of Economics and Management of Beijing Normal University.
- 2021年6月29日, IMA美国管理会计师协会与北京师范大学经济与工商管理学院在北师大经管学院联合举办CMA奖学金颁奖仪式暨管理会计系列讲堂活动。

MOU with Dongbei University of Finance and Economics

IMA与东北财经大学结成战略合作伙伴



- On December 15, 2020, IMA signed a MOU with Dongbei University of Finance and Economics.
- 2020年12月15日, IMA美国管理会计师协会与东北财经大学签署了战略合作谅解备忘录, 正式成为战略合作伙伴。



- Both sides to carry out cooperation in many fields, including the joint establishment of management accounting practice research topics, CMA scholarship co-host summit on management accounting, and jointly promote management accounting.
- 此次战略合作将在充分发挥双方优势的基础上开展多领域合作, 包括联合设立管理会计实务研究课题; 设立专项CMA奖学金, 鼓励管理会计人才培养; 联合主办具有影响力的管理会计高峰论坛等, 共同推动管理会计未来发展

MOU with Shanghai University MBA Center

IMA与上海大学MBA中心结成战略合作伙伴

- January of 28, 2021, IMA signed MOU with Shanghai University MBA Center.
- 2021年1月28日，IMA与上海大学MBA中心正式达成战略合作伙伴关系
- In the future, the two sides will carry out in-depth cooperation in joint research on management accounting, management accounting forum and talent development.
- 未来，双方将深入开展管理会计联合研究、管理会计论坛、人才培养等方面的合作。



MOU with Shanghai JiaoTong University ANTAI Business School

IMA与上海交通大学安泰经济与管理学院结成战略合作伙伴



- On April 20, 2021, IMA signed MOU with Shanghai JiaoTong University ANTAI Business School.
- 2021年4月20日，IMA与上海交通大学安泰经济与管理学院正式签署战略合作谅解备忘录。
- In the future, the two sides will deepen cooperation in management accounting research, talent training, cooperative forums, CMA scholarships and other aspects to jointly promote the development of management accounting.
- 未来，双方将在管理会计研究、人才培养、合作举办论坛、CMA奖学金等方面深入合作，共同推动管理会计发展。



MOU with Ocean University Of China

IMA与中国海洋大学管理学院结成战略合作伙伴

- July 12, 2021, IMA signed MOU with Ocean University Of China.
- 2021年7月12日，IMA与中国海洋大学管理学院正式签署战略合作备忘录。
- The two sides will jointly carry out management accounting research, jointly hold management accounting forum, CMA scholarship program, etc., to facilitate the development of management accounting talents.
- 双方将联合开展管理会计研究、共同举办管理会计论坛、CMA奖学金项目等，助力管理会计人才发展。



MOU with China University of Petroleum

IMA与中国石油大学结成战略合作伙伴



- July 12, 2021, IMA signed MOU with China University of Petroleum
- 2021年7月12日，IMA正式与中国石油大学（华东）签署战略合作备忘录。
- The two sides will cooperate on management accounting talent development, CMA scholarships, joint research and activities on management accounting, and jointly promote the development of management accounting.
- 双方将就管理会计人才培养、CMA奖学金、管理会计联合研究及活动等方面展开合作，共同推动管理会计发展。



MOU with the School of Management of Xi'an Jiaotong University

IMA与西安交通大学管理学院结成战略合作伙伴

Strategic partnership reached with Xi'an Jiaotong University School of Management

2021年10月19日，IMA与西安交通大学管理学院结成战略合作伙伴

- Building on the solid foundation, both sides agreed to make more use of resources to further enhance cooperation in multiple aspects, including innovation and development in high level talents training, activities and forums, knowledge exchanges, joint research projects by industry-university-research.
- 在已有良好的合作基础之上，双方将进一步利用资源优势，建立全面交流的平台，进一步加强高层次人才的培养及科研领域的发展创新，为社会输送更多优秀的管理人才。



Meeting with top universities 与中国知名高校保持积极互动



Visiting Jinan University on Nov 13, 2019

2019年11月13日拜会暨南大学

IMA board of director Ms. Liv Watson and IMA China Chief Representative Mr. Li Gang met with Mr. Li Wenjing, Dean of management school, Jinan University, and had active discussion on management accounting education and talent development.

IMA董事会成员Liv Watson女士以及IMA中国区首席代表于2019年11月13日拜会暨南大学管理学院院长黎文靖教授，双方就管理会计教育及人才培养展开友好交流。



Visiting Shanghai International Studies University on Oct 28, 2019

2019年10月28日拜会上海外国语大学

Jeffrey Thomson, President and CEO of IMA met with Mr Wu Yunqiao Associate Dean, School of International Business Administration, Shanghai International Studies University, and had comprehensive discussion on management accounting international talent development.

IMA总裁兼首席执行官Jeffrey Thomson先生于2019年10月28日下午拜会上海外国语大学国际工商管理学院吴昀桥副院长，双方就管理会计国际人才培养进行了深入探讨。

Establishing of IMA China Academic Committee

IMA学术委员会正式成立



The 1st meeting of IMA China Academic committee in December 2019, Shanghai.

IMA学术委员会第一次会议于2019年12月13日在上海举行，标志着IMA学术委员会正式成立。

IMA China Academic committee involves 17 renowned professors from different universities.

中国区学术委员会有来自中国区17所高校的17位教授。



6th Academic Conference in Shanghai

第六届IMA管理会计教育创新与发展学术高峰论坛



6th Academic Conference in Shanghai was held in Shanghai on Sep 19, 2020.

第六届IMA管理会计教育创新与发展学术高峰论坛于2020年9月19日在上海成功举办。

There were 20+ speakers from China top universities sharing their insights and experiences.

来自20余所中国知名院校专家教授齐聚一堂，共同分享管理会计相关经验和洞见。



There were 100+ offline attendees and 1,200+ online audiences participated.

现场100余名学术领域专家参会，线上同步直播吸引了1200名观众在线收看。



The 7th Academic Conference in Xiamen

第七届IMA“新会计、新技术”学术高峰论坛

The 7th Academic Conference was held in partnership with Xiamen University on May 15, 2021. 第七届IMA管理会计“新会计，新技术”学术高峰论坛于2021年5月15日与厦门大学合作成功举办。

It gathered about 20 top level academics, researchers and practitioners from China top universities and companies sharing their insights and experiences.

来自全国众多顶级学府的管理会计专家与实务界精英人士汇聚一堂，围绕信息化背景下的新会计人才需求与新技术实施的主题展开了充分探讨。

There were 250 attendees at present and the whole summit was live streamed online.

现场约250名学术专家参会，线上同步直播。



China academics delegation to U.S. 中国学术代表团访美

China academics delegation visits U.S. in 2015. Activities conducted:
中国学术代表团在2015年访问了美国，并在此之间进行了各种活动：

- IMA Global Annual Conference & Expo
IMA全球年会
- Management accounting education and research international forum
管理会计教育和研究论坛
- Cross-universities visits and workshop.
多个大学的访问和研讨。



Visit University of Utah, California State Polytechnic University of Pomona, and Brigham Young University.

参访犹他大学、美国加州波莫那州立理工大学、杨百翰大学。



Management accounting education and research international forum
管理会计教育与研究国际论坛



Award to Chinese scholars for outstanding contribution to management accounting advocacy.

授予中国学者管理会计倡导杰出贡献奖

China academics delegation to U.S. 中国学术代表团访美

- We organized a contingent of leading Chinese academics to be part of IMA 100th year anniversary celebration in San Diego this June 2019;
- 我们邀请了由中国顶级学者组成的代表团参与2019年6月于美国圣迭戈举办的IMA 100周年庆典；
- The champion team of case competition presented at the ACE100 stage and communicated with students from other regions.
- 中国管理会计校园案例大赛冠军队伍在百年庆典的舞台上展示中国高校学生风采，并与其它区域的获胜队伍热烈交流。



Scholarships

奖学金

CMA Scholarship

CMA 奖学金

IMA sets up the CMA Scholarship, which allows the honored students to pursue the CMA exam at no cost.

IMA 设立了CMA 奖学金项目，认可并授予最优秀的学生以荣誉、免去其CMA 考试的相应费用。

IMA has launched the CMA Scholarship in many well-known Chinese universities. There are over **1,000 students** received the CMA scholarship. 目前，IMA 已和国内众多知名高校开展了CMA 奖学金项目合作，数年来共有**1000** 多名优秀学生获得了CMA 奖学金。

IMA为上海国家会计学院亚太财经与发展学院（AFDI）国际留学生项目提供专项奖学金

Scholarship to SNAI's program of Asia Finance and Development Institute international students

IMA has been providing scholarship to Asia Finance and Development Institute international students program of **RMB20,000 per year, for a five-year period.**

IMA为上海国家会计学院亚洲金融与发展学院国际学生项目提供**每年2万元**人民币的奖学金，**为期5年**。



Student Case Competition

IMA校园管理会计案例大赛

The Student Case Competition is sponsored annually by IMA.
IMA 校园管理会计案例大赛是由美国管理会计师协会(IMA) 主办的全球性校园公益活动。

The Student Case Competition **launched in China in 2009.**
IMA 校园管理会计案例大赛于**2009年**首次向中国高校开放，每年举办。

Until May, 2019, the competition has been successfully held for **nine years.**
截止到2019年5月，在中国已成功举办了九届。

It attracts more than **24,000 students** from over **600 universities.**
吸引了来自**600**余所高校的**24,000**多名学生的参与。

The 10th Case Competition held jointly with Fudan University and was scheduled to start in September, 2020.
第十届案例大赛和复旦大学联合举办，于2020年9月启动



Winner team got internship opportunity in corporates.
获胜队伍获得在企业实习的机会



Winner team to ACE15, Los Angeles, 2015.
获胜队前往洛杉矶参加IMA2015全球年会



Winner team to ACE16, Las Vegas, 2016
获胜队前往拉斯维加斯参加IMA2016全球年会



Final competition, 2019
2019案例大赛全国总决赛

IMA-Fudan University 10th Campus Management Accounting Case Competition

IMA-复旦大学 第十届校园管理会计案例大赛



- IMA-Fudan University 10th Campus Management Accounting Case Competition was launched officially in September, 2020.
- IMA-复旦大学 第十届校园管理会计案例大赛于2020年9月正式启动。
- The competition is co-organized by IMA and Fudan University, which is one of the top universities in China.
- 本届大赛是由IMA和复旦大学共同举办。
- Over the course of 9 months, a total of 779 teams and 3,574 people signed up, which achieve record-breaking number of teams and number of people.
- 历时9个月，共有779支队伍3574人报名，报名队伍及人数皆为历届之最。
- On May 23, 2021, the national Final of IMA-Fudan University 10th Campus Management Accounting Case Competition was successfully held in School of Management of Fudan University
- 2021年5月23日，IMA-复旦大学（第十届）校园管理会计案例大赛全国总决赛于复旦大学管理学院成功举办

Management Accounting Day

管理会计宣传日

- IMA initiated setting May 6th as “**Management Accounting Day**” in 2012. It aims to publicize and promote the concept of management accounting.
- Up to now, a series of publicity activities have been carried out for **eight years**, and good social effects have been achieved.
- 美国管理会计师协会(IMA)在**2012**年倡议提出每年5月6日为“**管理会计宣传日**”，旨在宣传和推广管理会计理念。
- 截至目前已**连续8年**开展系列的管理会计普及宣传活动，并取得了良好的社会效应。



Management accounting practice exchange summit, Chengdu, May 6, 2018
2018年5月6日管理会计实践分享峰会，成都



Shenzhen Summit on Innovative Financial Management & Management Accounting Practice Forum, co-organized with Shenzhen CPA Institute, Shenzhen Accounting Association, May 16, 2019

2019年5月16日 IMA联合深圳市注册会计师协会共同举办“深圳市创新财务管理峰会暨管理会计实践论坛”



Innovative Financial Management Conference, co-organized with Guangdong Association of Management Accountant (GAMA), May 17, 2019

2019年5月17日 IMA联合广东省管理会计师协会共同举办创新财务管理实践论坛



MOU and engagement with corporations

与知名企业签订合作备忘录并开展专业交流活动



Meeting and signing MOU with Fosun, establishing a resources and information sharing platform, on talent development, case study, seminar, and continuous education. (August 16, 2019)

双方签署战略合作备忘录，搭建起信息共享及交流的平台，在人才培养、案例研究、研讨会、持续教育等方面进行深入合作。
(2019年8月16日)



Join Seminar within Fosun on management accounting practice sharing. Speaker is a CMA invited by IMA. Financial professional of Fosun participated actively. (August 8, 2019)

IMA联合复星集团企业大学复星大学举办午餐分享会，邀请资深CMA做主题分享，复星集团财务管理人员积极参与（2019年8月8日）

MOU and engagement with corporations

与知名企业签订合作备忘录并开展专业交流活动



Meeting and signing **MOU with Shanghai Towner**, on talent development, case study, seminar, and continuous education. (June 6, 2020)

IMA与上海中心大厦签署了白金级企业战略合作伙伴关系备忘录（2020年6月6日）

- Meeting and signing **MOU with Seebon Group**, on talent development, case study, seminar, and continuous education. (July 2, 2020)
- IMA与仕邦集团达成战略合作伙伴关系 (2020年7月2日)
- 仕邦集团是国内最具影响力的人力资源服务商之一，是华南人力资源服务行业龙头企业
- Shibang Group is one of the most influential human resource service providers in China and a leading enterprise in the human resource service industry in South China

MOU and engagement with corporations

与知名企业签订合作备忘录并开展专业交流活动



Meeting and signing **MOU with SanPower Group**, on talent development, seminar, and continuous education. (Sep 4, 2020)

IMA与三胞集团签署签署了白金级企业战略合作伙伴关系备忘录（2020年9月4日）



Meeting and signing **MOU with Shanghai Yuyuan Group**, on talent development, seminar, and continuous education. (Sep 4, 2020)

IMA与豫园股份签署白金级企业战略合作伙伴关系备忘录（2020年9月4日）

MOU and engagement with corporations

与知名企业签订合作备忘录并开展专业交流活动



- January 28, 2021, IMA signed MOU with **OCBC WingHang (China) Group**.
- 2021年1月28日，IMA与华侨永恒银行（中国）有限公司签署白金级企业战略合作伙伴关系备忘录



- March 31, 2021, IMA signed MOU with **Haier Group**.
- 2021年3月31日，IMA与海尔集团签署白金级企业战略合作伙伴关系备忘录

MOU and engagement with corporations

与知名企业签订合作备忘录并开展专业交流活动



- April 20, 2021, IMA signed MOU with **WANT WANT Group**.
- 2021年4月20日，IMA与中国旺旺控股有限公司签署白金级企业战略合作伙伴关系备忘录



- April.21, 2021, IMA signed MOU with **ZHONGHUI LLP**.
- 2021年4月21日，IMA与中汇会计师事务所签署白金级企业战略合作伙伴关系备忘录

MOU and engagement with corporations

与知名企业签订合作备忘录并开展专业交流活动



- Apr.21,2021, IMA signed MOU with **ANJI-CEVA**.
- 2021年4月21日，IMA与安吉智行物流有限公司签署白金级企业战略合作伙伴关系备忘录

- September 17,2021, IMA signed MOU with **Bosch (China)**.
- 2021年9月17日，IMA与博世（中国）签署白金级企业战略合作伙伴关系备忘录

MOU and engagement with corporations 与知名企业签订合作备忘录并开展专业交流活动



- October 26, 2021, IMA signed MOU with **Decathlon (China)**.
- 2021年10月26日，IMA与迪卡侬集团签署白金级企业战略合作伙伴关系备忘录



- November 8, 2021, IMA signed MOU with **PwC**
- 2021年11月8日，IMA与普华永道签署白金级企业战略合作伙伴关系备忘录

MOU and engagement with corporations

与知名企业签订合作备忘录并开展专业交流活动



- On March 15, 2020, IMA and Ping An Group signed MOU.
- 2020年3月15日，IMA与平安集团签署白金级企业战略合作伙伴关系备忘录。
- The two sides will carry out in-depth cooperation in management accounting personnel training, professional skills training, talent recommendation, industry-university-research and research.
- 双方将在管理会计人才培养、专业技能培训、优秀人才推荐、产学研研究等方面展开深入合作。

James Bulloch Award

James Bulloch 年度大奖

- China South Industries Group Corporation received James Bulloch Award at the 95th IMA Global Annual Conference.
- PingAn Group received James Bulloch Award in 2017.
- In recent years, James Bulloch Award has been granted to many well-known companies and governmental agencies, including Caterpillar, Johnson & Johnson, Microsoft, State Administration of Foreign Experts Affairs, etc.

- 中国南方工业集团在第95届IMA全球年会上领取了2014年度James Bulloch大奖。
- 中国平安集团荣获2017年度James Bulloch大奖。
- 近年来获得此奖项的机构还包括卡特彼勒、强生、微软、中国国家外国专家局等知名企业和政府机构。



China South Industries Group Corporation received James Bulloch award in 2014
中国南方工业集团荣获2014年度James Bulloch大奖



PingAn Group received James Bulloch award in 2017
中国平安集团荣获2017年度James Bulloch大奖
(December 4, 2017)



Corporate communications 企业交流

IMA has been cooperating with partners to conduct management accounting training / visits within corporates, aiming to enhance exchange and communications with management accounting practitioners and support corporates to develop the core competency of financial professionals.

IMA联手合作伙伴共同开展在企业内部的管理会计培训/访问，旨在加强管理会计从业人员之间的的经验交流，助力企业提升其财务人员的核心竞争力。



Management accounting training within China North Industries Group Corporation Limited, June 10, 2017
中国兵器工业集团2017管理会计专题培训班
(2017年6月10日)



Management accounting training within China National Petroleum, September 18, 2018.
中国石油天然气集团有限公司举办管理会计内部培训，2018
(2018年9月18日)



Corporate visit to Xiaopeng Automobile, May 17, 2019
企业拜访走进小鹏汽车，2019
(2019年5月17日)



Corporate visit to Fosun Group, May 17, 2019
企业拜访走进复星集团
(2019年5月17日)

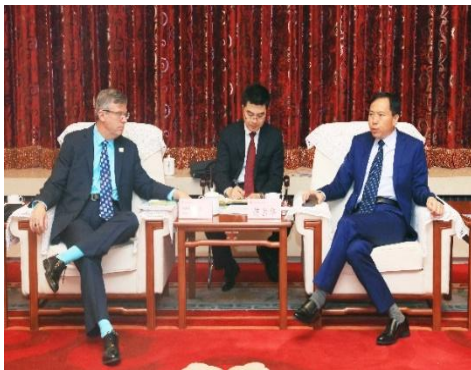


Corporate communications

企业交流

Visiting China National Salt Industry Corporation (China Salt)

- On 2019 May 9th, meeting with Zhanhua JIANG, CFO of China Salt



Visiting Industrial and Commercial Bank of China (ICBC)

- On 2019 May 9th, meeting with Mr. Wenwu ZHANG, General Manager, Financial Accounting Dept of ICBC



Visiting China Electronics Technology Group Corporation (CETC)

- On 2019 May 10th, meeting with Shouwu LI, Deputy General Manager and CFO of CETC



Visiting China International Marine Containers (CIMC)

- On 2019 July 3rd, meeting with Mr. Ji Haifeng, Executive Vice President & CFO



Visiting PingAn Group

- On 2019 November 14th, meeting with Mr. Li Rui, Director of Finance Department.

Corporate communications

企业交流

- March 24, 2021 IMA-Haier Visit and held Management Accounting Practice workshop
- 2021年3月24日，IMA走进海尔并举办管理会计实践论坛



- April 2, 2021, IMA held MA Series Sharing Session within OCBC.
- 2021年4月2日，IMA走进华侨永恒（中国）并举办管理会计分享活动

Corporate communications

企业交流

- April 9, 2021, IMA held MA Series Sharing Session within within YUYUAN Group.
- 2021年4月9日，IMA走进豫园股份并举办管理会计分享活动。



- May 25, 2021, IMA held sharing session within ANJI-CEVA.
- 2021年5月25日，IMA走进安吉智行并举办管理会计分享活动。



Corporate communications 企业交流

- October 22, 2021, IMA organized CMA visit CATERPILLAR and held management sharing session.
- 2021年10月22日，IMA走进卡特彼勒，探讨管理会计推动企业发展的能力与创新



- October 26, 2021, IMA held sharing session with Decathlon.
- 2021年10月26日，IMA走进迪卡侬，探讨企业财务数字化转型

Corporate communications 企业交流



- On September 17, 2021, IMA jointly held management accounting sharing and exchange activity together with Chengdu Accounting Society and CoFCO Coca-Cola in CoFCO Coca-Cola Beverage (Sichuan) Co., LTD., Xindu District, Chengdu.
- 2021年9月17日，IMA协会、成都市会计学会、中粮可口可乐在成都市新都区中粮可口可乐饮料（四川）有限公司联合举办了管理会计分享交流活动。

Management Accounting Forums

管理会计专业论坛

IMA is committed to empowering financial professionals to strengthen competencies and accelerate careers and supporting corporates for value creation. In order to achieve the goals, IMA has been conducting various management accounting forums to facilitate best practice sharing and communications among financial professionals.

IMA致力于为财务从业人员增强核心竞争力助推其职业发展提供支持，并助力企业价值创造。为了实现这一目标，IMA持续举办管理会计实践论坛，以促进财务人员的最佳实践经验分享和交流。



Management accounting practice forum series across China, 2016
2016管理会计中国行



Joint forum with AmCham--2017 Finance Management Forum
2017 IMA与华南美商会联合举办财务管理论坛



Joint forum with Kingdee on Management Accounting Practice forum
IMA与金蝶联合举办管理会计实践论坛
2018年11月，深圳



Management accounting best practice conference in Beijing,
December 21, 2019
管理会计实践论坛
2019年12月21日，北京



Management Accounting Forums

管理会计专业论坛



IMA第六届管理会计高峰论坛 2019年
10月25日, 北京
IMA 6th Management Accounting
Summit, Beijing, Oct 25, 2019



Joint salon with Shenzhen CPA,
Shenzhen, Nov 14, 2019
IMA&深圳注册会计师协会联合沙龙,
2019年11月14日, 深圳



Management Accounting Practice Forum,
Chengdu, Oct 27, 2019
管理会计实践论坛, 2019年10月27日, 成都



Management Accounting Forums 管理会计专业论坛



IMA第七届管理会计高峰论坛
2020年11月20日，上海
IMA 7th Management Accounting Summit
Shanghai, Nov 20, 2020



Management Accounting Forums

管理会计专业论坛



The Association of Accountants and Financial Professionals in Business
美国管理会计师协会

第八届管理会计高峰论坛

The 8th IMA Management Accounting Summit

开放 / 融合 / 赋能

中国 | 深圳 CHINA | SHENZHEN 2021.11.26

首 / 轮 / 重 / 磅 / 嘉 / 宾 / 阵 / 容



Jeffrey C. Thomson
CMA/ACMA/CFP
美国管理会计师协会全球首席执行官



梁家生
北京四大会计师楼
高级经理 元璟瑞信



吴俊峰
北京德勤会计师事务所
高级经理 林怡怡 吴俊峰



王亮
字序美华会计师事务所
首席管理合伙人



姚晓青
上海美华会计师事务所有限公司
首席管理合伙人 姚晓青 姚晓青



林静
北京德勤
首席管理合伙人



郑文娟
德勤华永会计师事务所
高级经理



李秀群
高级经理
财务与审计中心高级经理 李秀群 李秀群



程慧
CMA/CFP
德勤华永会计师事务所
高级经理 程慧 程慧



黄科
德勤华永会计师事务所
高级经理

1 场年度管理会计思想盛宴 2 个主题鲜明的平行分论坛
3 轮跨行业的领袖高峰对话 25 位跨行业领袖级重磅嘉宾



扫描二维码进行报名




The Association of Accountants and Financial Professionals in Business

第八届管理会计高峰论坛

The 8th IMA Management Accounting Summit

开放 / 融合 / 赋能



「企业可持续发展信息的披露与管理」
可持续发展有信心也要有信任!

IMA第八届管理会计高峰论坛（首次线上）
2021年11月26日
IMA 8th Management Accounting Summit
(first virtual annual summit)
Nov 26, 2021



The Association of Accountants and Financial Professionals in Business



第八届管理会计高峰论坛

The 8th IMA Management Accounting Summit

开放 / 融合 / 赋能

正在直播 第八届管理会计高峰论坛

目录

- 01 我眼中的女性商界精英
- 02 新发展格局带来的挑战
- 03 数字经济促财务数字化转型
- 04 数字化转型的未来展望

聊天互动

关于回放，更多详细信息请关注CMA官微，后续我们将通过CMA官微及时分享。

14:55

范超群_185238...
👍

王瑾_1516089...
👍

黄生雄_186592...
谢谢

程慧_1388655...
谢谢分享

余雷荣_136412...
太好了

陈志玉_159132...

Management Accounting Forums

管理会计专业论坛



On April 9, 2021, IMA held the Financial talent summit and MA practice summit jointly with Chengdu government, an MOU signed to establish the IMA Management Accounting International Exchange Center in Southwest China.

2021年4月9日 由四川天府新区管理委员会与IMA共同举办天府金融英才高峰论坛。签署了关于IMA管理会计（西南）国际交流中心项目的合作协议，并举行了隆重的揭牌仪式。

On May 22, 2021 May, IMA held IMA Management Accounting City Forum in Tianjin jointly with Tianjin Accounting Association.

2021年5月22日由天津市财政局指导、美国管理会计师协会 (IMA)与天津市会计学会联合主办的“IMA管理会计城市论坛”在天津隆重举行。



On April 9, 2021, IMA and Shenzhen Institute of Certified Public Accountants jointly held the Financial Digital Transformation Practice Forum

2021年4月9日，IMA联合深圳市注册会计师协会联合举办金融数字化转型实践论坛



Management Accounting Forums

管理会计专业论坛

Annual Cooperated Events on Management Accounting

年度管理会计合作论坛



“计”古开今——会计文化起源传承与创新”研讨活动 (中国会计报主办)
2020年11月28日, 浙江

Annual Cooperated Event- The Annual Summit (China Accounting News owned) Zhejiang, Nov 28, 2020

第十五届中国CFO大会暨2019中国CFO年度人物颁奖典礼 (新理财杂志社主办)
2020年11月6日, 北京

Annual Cooperated Event- The 15th China CFO Summit (New Finance Magazine owned) Beijing, Nov 6, 2020



第十一届中国国际财务领袖年会 (中国CFO发展中心主办)

2020年12月16日, 北京

Annual Cooperated Event- The 11th China International Financial Leader Annual Summit (CFODC owned) Beijing, Dec 16, 2020



Roundtables in China 专业研讨会



Innovation Value card workshop. August 20, 2016, Beijing.
中国管理会计50人论坛 季度圆桌会，北京
(2016年8月20日)



COSO ERM workshop, 2017, Beijing.
2017年COSO企业风险管理研讨会，北京
(2017年8月29日)



ERM workshop, 2017, Guangzhou.
2017年企业风险管理研讨会，广州
(2017年12月2日)



COSO ERM workshop, 2018, Shenzhen.
2018年COSO企业风险管理研讨会，深圳
(2018年10月27日)



Impact of new technology on the Role of
the Management Accountant, 2018,
Shenzhen.
2018年新科技对管理会计职能的影响研讨
会，深圳
(2018年5月8日)

Roundtables in China

专业研讨会

- IMA Shenzhen roundtable on December 11, 2020, Transforming the finance function with RPA
- 2020年12月11日，IMA举办深圳圆桌论坛：RPA对财务职能转型的影响
- 36 C-Suite leaders from first-tier enterprises including Microsoft, Gartner, Tencent, JD.com, UiPath, Midea Group, Ping An Group, Deloitte, BGI Group, and ICBC attended the event.
- 来自微软、高德纳、腾讯、京东、UiPath、美的集团、平安集团、德勤、华大基因集团、中国工商银行等一线企业的36位首席财务官/副总裁参加了本次活动。



Roundtables in China 专业研讨会

- On May 23, 2021, IMA and HSBC jointly held a value investment Practice Seminar
- 2021年5月23日，IMA携手汇丰银行联合举办价值投资实务研讨会



IMA Management Accounting Digital Forums

IMA管理会计大咖云讲堂



IMA Management Accounting Digital Forum

IMA管理会计大咖云讲堂

- IMA launched the "" series in February 2020, focusing on trendy topics, insight, and local best practice sharing.
- Inviting 2-3 industry experts to deliver presentation in each episode, with 1-2 episodes each month.
- Up till September, 9 episodes have been developed and received 21,700+ view times in total with large members of positive feedback.
- IMA于2020年2月推出“管理会计云讲堂”系列活动，聚焦管理会计热点话题，分享前沿实践。
- 每期邀请2-3位业内专家参与分享，每个月推出1-2次云讲堂节目。
- 截止到2021年11月，共推出23期节目，共计浏览量达到 73,600+人次；收到广泛好评。



Digital forum on Career development path for financial personnel

线上论坛：财务人员的职业发展之路

- In April 2020, IMA jointly launched an online forum with the Financial Bureau of Sichuan Tianfu new district Chengdu management committee to focus on the career development of financial personnel, sharing cases and exchanging experience.
- 2020年4月，IMA联合四川天府新区成都管委会财政金融局共同推出线上论坛，聚焦企业财务人员职业发展，分享案例，交流经验。



疫情危机下 财务人员的职业发展之路

在大企业做一薪福利好，还是在小企业做一跟班强？
企业数字化转型，对财务工作及财务人员职业发展有哪些影响？

活动背景

- 2020年伊始，新冠病毒疫情来袭，给全球经济带来前所未有的冲击，也深刻地影响我们的生活。“疫情”持续，但疫情终将过去，企业的健康、稳定发展，离不开所有员工的努力和成长。作为财务人员，该如何“随机应变”才能“顺势而为”呢？
- 为此，在天府新区管委会指导下，IMA美国管理会计师协会联合天府国际基金小镇，特别邀请资深财务专家，共同探讨疫情危机下的财务人员职业发展与规划。

主办单位

- 四川天府新区成都管委会财政金融局
- 四川天府新区成都管委会科技创新和人才服务局
- IMA美国管理会计师协会
- 天府国际基金小镇

分享嘉宾

路通 先生
20:00-20:40 (40 min)
案例现场实操进阶的财务人员

路通，CMA，MBA，16年财务管理经验，现任某大型医疗健康产业集团区域财务总监，全面负责公司财务管理和运营管理工作。擅长先生产再销售的财务管理实践经验，擅长税务筹划、应收账款管理、预算管理、投融资管理、资金管理、业财融合等方面。尤其在业财一体化领域有自己独到的见解。

贾树杰 先生
20:40-21:20 (40 min)
一个外企财务人员更换职业的过程

贾树杰，CMA、ACCA，美注资物创始人、首席咨询师，23年全球500强财务管理经验，曾担任普华永道毕马威Lane Crawford 财务负责人、艾默生财务总监、百中中国财务总监。贾先生于2019年创立美注咨询，专注于财务、管理会计咨询。

WeChat Micro Course

微信轻听CMA平台



Iterated by version 2.0 全新推出 2.0版本

- “WeChat micro course” is based on WeChat platform, aiming to provide systematic, fragmented and professional management accounting knowledge popularization content for members and financial professionals; as well as showcase the professionalism of CMAs.
- “轻听CMA”栏目基于微信平台，旨在为CMA考生及持证者以及广大财务人士提供系统化、碎片化和专业化的管理会计知识普及内容，展示优秀CMA的专业风采。
- Since it was launched in October 2017, “WeChat micro course” has received wide attention and positive feedback; in July 2021, the platform was upgraded with the release of 2.0 version, which continues to optimize the learning experience.
- 自2017年10月推出以来，轻听CMA获得了广泛关注和好评；2021年7月，该平台完成升级，轻听CMA2.0版全新推出，持续优化学习体验。
- From the launch of the platform to November 2021, “WeChat micro course” has developed 55 courses, with 57,600+ View times.
- 自平台推出至2021年11月，轻听CMA累计推出55门课程，共计浏览量超过57,600人次。

Management Accounting and Sustainable Development Digital Forums / 管理会计与可持续发展在线论坛

Management Accounting and Sustainable Development Digital forum 线上论坛：管理会计与可持续发展在线论坛



- Cooperated with multiple partners, IMA launched two online forums on management Accounting and sustainable Development in May and August 2020 respectively.
- Several experts in management accounting and sustainable development were invited to share their experiences and insights
- These digital forums received 18,400+ viewers in total.
- IMA联合合作伙伴，分别于2020年5月和8月，推出了两期管理会计与可持续发展在线论坛
- 论坛邀请到多位管理会计及可持续发展领域的专家分享相关的经验和洞见
- 共计浏览量达到 18,400+人次。

Management Accounting and Sustainable Development Forums / 管理会计与可持续发展论坛

Offline Management Accounting and Sustainable Development Forum 管理会计助力科技创新与城市可持续发展论坛

- Cooperated with multiple partners, IMA launched the offline Management Accounting and Sustainable Development Forum in Shenzhen on December 12, 2020.
- Several experts in management accounting and sustainable development were invited to share their experiences and insights
- The number of attendees reached 200 pax.
- IMA联合合作伙伴于2020年12月12日在深圳推出了管理会计助力科技创新与城市可持续发展的专题线下活动
- 论坛邀请到多位管理会计及可持续发展领域的专家分享相关的经验和洞见
- 线下参会的规模达到200人



IMA's Social Responsibility

IMA的社会责任

IMA's Social Responsibility

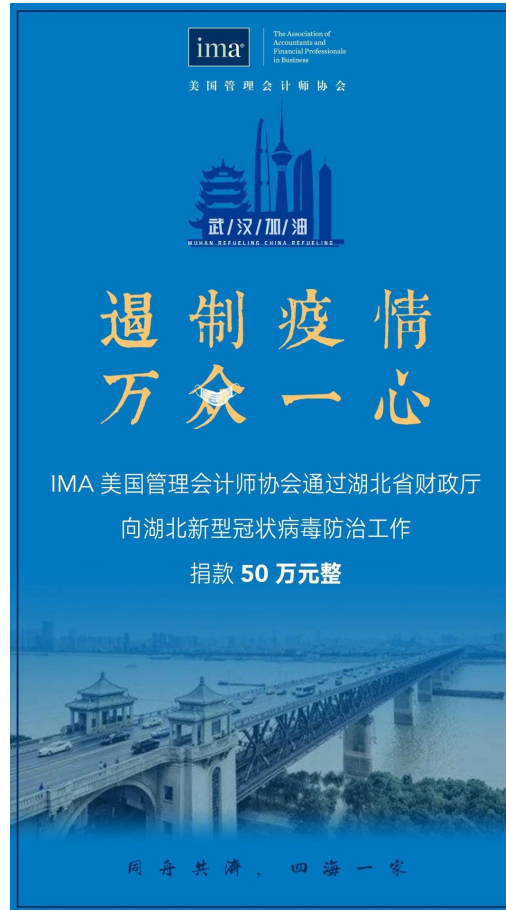
IMA recognizes its social responsibility as an integral part of its firm commitment to the profession and society.

IMA坚持将社会责任视作基石，始终坚守并积极履行对行业及社会的承诺。

Donations to Hubei for COVID-19 prevention and control work

Donation IMA捐款

- IMA donated RMB 500,000 to Hubei COVID-19 prevention and control work through the Finance Department of Hubei Province.
- IMA通过湖北省财政厅向湖北新型冠状病毒防治工作捐款人民币50万元整。
- Hubei Provincial Department of Finance issued Thank you letter to IMA.
- 湖北省财政厅向IMA发出感谢信。



湖北省财政厅

感谢信

美国管理会计师协会暨北京希姆埃管理咨询有限公司：

2020年新型冠状病毒感染的肺炎疫情发生以来，在党中央、国务院的高度重视下，湖北省已取得疫情防控阻击战的胜利。在湖北省最需要帮助的时候，贵单位第一时间向我省捐赠50万元，以实际行动表达了支持我省抗疫的深情厚谊。

受湖北省委、省政府的委托，省财政厅特向你们表示衷心的感谢。病毒没有国界，疫情不分种族。让我们携手应对，为早日战胜新冠病毒贡献力量。



Thank you letter from Hubei Provincial
Department of Finance
湖北省财政厅向IMA发出感谢信



Free Access to IMA Resources during COVID-19



90天IMA资源畅享计划

新型冠状病毒目前正在全球肆虐，IMA始终密切关注疫情的变化，努力为抗击疫情贡献力量所能及的力量，并一如既往地支持CMA考生和持证者以及广大财务管理领域的同仁们提供支持。

与此同时，我们也希望为更多财务专业人士提供有益的帮助，协助他们即使在这样的特殊时期也始终保持进益。因此，IMA特别推出“90天资源畅享计划”。自参加该项目之日起90天内，您可以无限次免费畅享IMA相关学习资源。我们希望能以这些优质学习资源为基点，助力有志于财务领域更广阔发展前景的专业人士、学术专家和学生，为他们的个人职业生涯提供更多可能性。

立即注册

Free Access to IMA Resources during COVID-19 疫情期间推出90天IMA资源畅享计划

- As we work through the COVID-19 pandemic together, IMA wants to help those in the accounting and finance profession keep moving forward as best they can during this disruption, and launched the 90 days Free Access program.
- IMA推出90天资源畅享计划，内容涉及持续教育、思想引领及行业交流等多个方面，旨在为广大财务管理领域的同仁提供支持，为协助财会专业人士在特殊时期保持进益。
- <https://www.imachina.org.cn/90daysfree.html>

IMA's social responsibility / IMA的社会责任

In Fall 2019, IMA China held a series of "social service days" as part of the "IMA Make a Difference Day" activities. IMA offices in Beijing, Shanghai and Shenzhen organized various forms of meaningful activities with partners.

2019年秋季，IMA中国区进行了“社会服务日”系列活动，位于北京、上海和深圳的IMA办公室分别通过不同的形式，与合作伙伴们一起，组织进行了多种有意义的活动。



IMA's social responsibility / IMA的社会责任

Since its inception, IMA has been striving for the trust that members, employees, partners, and society can count on.

With the completion of the NGO registration that makes IMA the first foreign NGO in accounting in China, we are ready to work hand in hand with partners to fulfil our commitment to the accounting profession and society.

自创立之初，IMA始终珍视考生及持证者、合作伙伴和社会的信任。

作为首个依照《中华人民共和国境外非政府组织境内活动管理法》在中国正式设立境外非政府组织代表处的国际会计组织，IMA将继续与各合作伙伴携手共赢，坚定履行对行业和社会的承诺。

The Building Blocks of Trust



To provide a forum for research, practice development, education, knowledge sharing, and advocacy of the highest ethical and best business practices in management accounting and finance.

To be the leading resource for developing, certifying, connecting, and supporting the world's best accountants and financial professionals in business.

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

Fundamental to our core values, IMA is committed to creating, nurturing, and advocating for a diverse, equitable, and inclusive member community, accounting and finance profession, and organizational workplace.



The Association of
Accountants and
Financial Professionals
in Business



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