

Websites

National: <http://www.aswa.org>

Local: <http://amesaswa.org>

**AMES CHAPTER OFFICERS**

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**MISSION STATEMENT**

To enable women in all accounting and related fields to achieve their full personal, professional and economic potential and to contribute to the future development of their profession.

**PRESIDENT'S MESSAGE**

Since there was not a quorum at the February meeting, the agenda items will remain the same for the March meeting. I know this is a busy time of year, but please try to attend. Thank you, Theresa, for covering for me last month. I know that many of you are knee deep in 1040s, but for those of us in the corporate world with a June 30<sup>th</sup> fiscal year end, March, April and May are the months we have to try to catch our breath and look at the big picture... health insurance plan, property and casualty insurance plan, 401(k) plan, overhead allocation, etc., etc. We outsource our IT support and I consider it money well spent.

What a winter this has been! But it has been beautiful the last few days and I am hopeful that I won't have to dodge any more storms this winter commuting between my two lives. I was brave and bought a single ticket to *Mama Mia!*, which played the Orpheum Theater in Omaha a couple weeks ago. I ended up sitting next to a man that lived above the theater and was also in a commuter marriage. He commutes between St. Louis and Omaha every week. We talked about airplanes and he wants my husband to drop him an e-mail sometime. If you get a chance to go to *Mama Mia!*... go! Pretty much a chick show, but I think a guy would enjoy it but might not admit it. I would have missed an absolutely wonderful evening if going solo would have stopped me. You'll be singing *Dancing Queen* for days to come!

Ann Kurtenbach

# ASWA

American Society of Women Accountants

## THE SPOKESWOMAN

Volume 3, Number 17

March, 2008

Ames Chapter #158

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### MEETING INFORMATION

Date: Wed., March 19th  
Time: 5:30 PM Social Time  
6:00 PM Speaker  
7:00 PM Dinner/Meeting  
Topic: Estate Planning  
by Financial Partners Group  
Location: Buford's Restaurant  
Quality Inn  
2601 E 13<sup>th</sup> Street, Ames  
RSVP: Donna Gladon  
please RSVP by Tues noon 3/18  
515-233-6554 or donnagladon@yahoo.com

### AGENDA

#### American Society of Women Accountants Ames Chapter #158 March 19, 2008

1. Call to Order
2. Quorum
3. Approval of January Minutes
4. Treasurer's Report
  - a. Monthly Report
  - b. 2007-2008 Budget
5. Committee Reports
  - a. Membership
  - b. Program
  - c. Bulletin
  - d. Scholarship
6. Old Business
  - a. Mall Gift Wrapping
  - b. Letter to National regarding new member fee assessment

7. New Business
  - a. Chapter Dues
  - b. 2008-2009 ASWA Chapter Officers
  - c. Speaker Gifts
8. Announcements
  - a. Next Meeting –April 16<sup>th</sup> - Buford's, 5:30 networking, 6:00 program, 7:00 meeting
  - b. Networking Lunch – Friday, March 28<sup>th</sup> at Dublin Bay, 12:00
9. Adjournment

### SPEAKER INFORMATION

The program for March is provided by Financial Partners Group through Kurt Maher, the Vice President and Director of Retirement Planning

Everyone should choose how their assets will be distributed after death, which is the focus of estate planning. Some of the issues addressed in this program are:

- determining desired inheritances
- alternatives of transferring assets
- effect of income, estate, and gift taxes
- strategies for overcoming tax liabilities

### JANUARY 2008 MINUTES

American Society of Women Accountants  
Ames Chapter #158  
Membership Meeting  
January 16, 2008

**Call to Order:** The January 2008 Membership Meeting of the Ames Chapter #158 was called to order by President Annmarie Kurtenbach in

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Ames at 8:00 pm on Wednesday, January 16 2008. Those in attendance were Cheryl Carlile, Jan Duffy, Donna Gladon, Karen Jacobson, Patricia Jenkins, Annmarie Kurtenbach, Lisa Lembke, Soma Mitra, Marilyn Moehlmann, Kate Mulder, Stephanie Roscoe, Theresa Samson, Kathleen Strum, Renee Twedt, Josie Six and guests Xiaowen Guo, Heather Scott, and Kacy Merseal. A quorum was present.

**Adoption of Agenda:** Annmarie Kurtenbach moved and Karen Jacobson seconded a motion to amend the agenda to include a discussion of the new national application fee under the Membership Committee Report. Motion carried.

**Approval of Minutes:** It was moved by Jan Duffy and seconded by Kate Mulder that the minutes be approved as written. Motion passed.

**Treasurer's Report:** There was no Treasurer's Report this month.

**Committee Reports:**

**Membership Committee:**

- Karen Jacobson presented five applications for approval by the membership: Jessica Green, Kacy Merseal, Heather Scott, Angie Andersen, and Xiaowen Guo. Jan Duffy made and Teresa Samson seconded a motion to accept the applications subject to approval by National. Motion carried.
- Karen Jacobson informed the group that she had received an email notification that the new membership application is available online in PDF format. Also, a \$25 processing fee for new members would be implemented as of February 15, 2008.

- Kate Mulder explained to the group why this new \$25 processing fee was being assessed to new members.
- Karen Jacobson made a motion and Patricia Jenkins seconded to send a letter to Nationals expressing to the board the groups desire to have this fee reconsidered with the option of increasing dues. Motion passed.
- Karen offered to draft the letter to be sent to the Board.

**Program:** Donna Gladon announced Kurt Maher from Financial Partners Group will speak at the next scheduled membership meeting. A related program is also being planned for the March meeting.

**Bulletin:** Submit all information and reports for the March bulletin to Mary Mosiman.

**Scholarship:** No scholarship information to report for January.

**Old Business:**

- **Gift Wrapping.** Annmarie Kurtenbach informed the group that only 37% of the total hours worked (203/550) was performed by ASWA. There was reported income of \$4900 and expenses of \$1,400 for a net profit of \$3,500. Ann explained a large supply of wrapping paper was ordered to stock the booth for gift-wrapping as compared to last year. Jan Duffy made the motion and Cheryl Carlile seconded to ask the committee how much of the expenses are fare to charge for inventory. Motion passed. Karen Jacobson made the motion and Patricia Jenkins seconded to continue with the gift wrapping next year. Motion passed.

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**New Business:**

- **Discussion of 2008-2009 Proposed Slate of ASWA National Officers:** Annmarie Kurtenbach announced that Kate Mulder is on the slate of National Secretary for 2008-2009.

**Announcements:**

**2008 National Conference:** October 28 – 30, Dallas, TX

**Next meeting:** February 20, 2008 at Buford's Restaurant.

**Networking Luncheon:** Wednesday, January 30th at The Cafe

**Adjournment:** Meeting adjourned at 8:41 pm.

Respectfully submitted,

Lisa Lembke, Secretary

**UPCOMING EVENTS**

**Networking Luncheons**

RSVP to Carla Danielson by 12:00 noon the work week day before each luncheon  
291-0253 or 292-6165 ext 805  
[carlad@ogdenbancshares.com](mailto:carlad@ogdenbancshares.com)

Date	Location	Time
Fri 3/28	Dublin Bay	12:00
Tues 4/29	Lucullan's	12:00
Thurs 5/29	La Fuente	12:00
Mon 6/30	Wallaby's	12:00

**UPCOMING MEETING**

**Date:** Wednesday, 3/19/08  
**Location:** Buford's Restaurant, Ames

**Date:** Wednesday, 4/16/08  
**Location:** Buford's Restaurant, Ames

**Date:** Wednesday, 5/21/08  
**Location:** Buford's Restaurant, Ames

**Date:** Wednesday, 6/18/08  
**Location:** Legend's Skybox, Ames

**ADDITIONAL NEWS**

Ames Chapter, ASWA  
Slate of Nominations 2008-2009

President	Stephanie Roscoe
Vice President	
Secretary	Cindy Sippel
Treasurer	Renee Twedt
Immediate Past President	Ann Kurtenbach
Program	

	Penny Strum
Membership	Carla Danielson
	Soma Mitra
Newsletter	Mary Mosiman
Scholarship	Lisa Lembke

Renee Twedt, Treasurer

Submitted by Pat Jenkins and Karen Jacobson,  
Nominating Committee

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**Hosted by the Flagstaff Chapter  
May 16-17, Flagstaff, AZ  
“Accounting with Altitude”  
13 hours of CPE  
(including 4 hours of ethics)**

Dear ASWA Member,

The Flagstaff Chapter invites you to attend the 2008 Southwest Regional Conference. The conference begins on May 16<sup>th</sup> at 12:30pm with an exciting fun filled day of CPE. The chapter exchange will be Friday evening followed by fun night at the hotel with games, prizes and more. The installation of the ASWA Foundation Board of Directors will take place on Saturday.

If you have any questions please call or email  
Kelly Robertson at 928-523-3711  
[kelly.robertson@nau.edu](mailto:kelly.robertson@nau.edu)

**QUOTE OF THE MONTH**

**A positive attitude may not solve all your  
problems, but it will annoy enough people to  
make it worth the effort.**

*-Herm Albright*

Articles and submissions to the newsletter are welcome. Please contact Mary at  
[bulletin@amesaswa.org](mailto:bulletin@amesaswa.org)