



Accounting & Financial Women's Alliance

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Ames Chapter

Accounting and Financial Women's Alliance
Ames Chapter #158
Membership Meeting
July 12, 2022

The monthly membership meeting was held July 12 at Cindy Sippel's home with seven members attending in person. The meeting was called to order by President, Carla Danielson at 7:22 pm. Those in attendance were members Cheryl Carlile, Carla Danielson, Jan Duffy, Annmarie Kurtenbach, Lisa Palmersheim, Karen Jacobson, and Cindy Sippel. A quorum was present. This was the annual planning meeting.

Minutes

Cindy Sippel made and Jan Duffy seconded a motion that the June 2022 membership meeting minutes be approved as printed in the bulletin. Motion carried.

Treasurer's report

Cindy Sippel presented the Treasurer's report for June 2022. As of June 30, 2022, the Chapter has a balance in the general fund of \$7,150.00 and \$5,743.51 in the scholarship fund. Of the scholarship fund, \$3,600.00 is restricted for the Kathleen M Strum scholarship, leaving an unrestricted balance of \$2,143.51 in the scholarship fund.

Cheryl Carlile and Jan Duffy reviewed the financial records for the year ended June 30, 2022 and found no errors. The Treasurer's report will be placed on file for Chapter inspection.

Old Business

None

Committee Reports

Membership: The Chapter has 16 members

The membership committee of Kate Mulder (chair), Jan Duffy, Cindy Sippel and Karen Jacobson has met twice via Zoom prior to the meeting. The committee would like to sponsor a membership drive event on the September and November meeting dates. The September meeting would include inviting people through Linked In, Facebook, and local groups like the Ames Young Professionals and the ISU Collegiate Women in Business Group. Members would also be encouraged to reach out to any people they know in the community.

Jan Duffy moved, and Karen Jacobson seconded, that the budget include \$1,000 to pay for this meeting. The motion passed.

The committee is also proposing that anyone who joins through this campaign and is an active member for two years will get their chapter dues for those two years refunded.

Programs: Karen Jacobson is working on getting a speaker from Fraudfighters through RSVP of the August meeting.

Discussion of continuing the meetings at Jethro's concluded that the group is generally happy with Jethro's and would prefer the bigger room when it is available.

Possible topics for speakers included time management, a tax update, DEI (Diversity, equity and inclusion), and health insurance in retirement.

The joint meeting was discussed. The general feeling was that we liked the joint meeting. We would like to suggest to the Des Moines Chapter that each chapter may determine the time and location of the meeting when it is their year to host. This would allow Des Moines to host their normal noontime meetings. It was suggested that Carla Danielson, as President, should reach out to Des Moines.

Scholarship: There was discussion of having a silent auction to benefit scholarship at the November meeting and that \$500 should be included in the budget for the silent auction.

Newsletter: No report.

Webmaster: No report.

Goals: Goals for the year included a net increase of two members and CPE offered in seven meetings.

Announcements

Annamarie Kurtenbach mentioned that excellent CPE was available from CPA Academy.

Thank you to Cindy Sippel for graciously hosting the meeting again this year.

Adjournment

Meeting adjourned at 8:31 pm.

Respectfully submitted,
Jan Duffy