



American Society of Women Accountants



Volume 7, Number 4

December 2011

Ames Chapter #158

Websites

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

Local: <http://amesaswa.org>

**AMES CHAPTER OFFICERS**

President: Lisa Palmersheim  
Email: [president@amesaswa.org](mailto:president@amesaswa.org)

Vice President: Soma Mitra  
Email: [vice-president@amesaswa.org](mailto:vice-president@amesaswa.org)

Secretary: Ann Kurtenbach  
Email: [secretary@amesaswa.org](mailto:secretary@amesaswa.org)

Treasurer: Penelle Strum  
Email: [treasurer@amesaswa.org](mailto:treasurer@amesaswa.org)

Past President: Marilyn Moehlmann  
Email: [past-president@amesaswa.org](mailto:past-president@amesaswa.org)

Program: Kayla Christensen  
Cheryl Carlile  
Email: [programs@amesaswa.org](mailto:programs@amesaswa.org)

Membership: Cindy Sippel  
Haiyan Li  
Email: [membership@amesaswa.org](mailto:membership@amesaswa.org)

Newsletter: Carla Danielson  
Email: [bulletin@amesaswa.org](mailto:bulletin@amesaswa.org)

Scholarship: Jan Duffy  
Lin Shen  
Penelle Strum, Treasurer  
Email: [scholarship@amesaswa.org](mailto:scholarship@amesaswa.org)

**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**

President's Message  
December, 2011

I look forward to seeing everyone who can make it to our Holiday Party this Wednesday at Jan's house. There will be lots of food to be shared and plenty of laughs to be had during our white elephant exchange. I know I've been shopping around the house looking for that perfect white elephant gift this year.

HAPPY HOLIDAYS!!!

Lisa Palmersheim  
President

**AGENDA**

None



American Society of Women Accountants



Volume 7, Number 4

December 2011

Ames Chapter #158

Websites

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

Local: <http://amesaswa.org>

**MEETING INFORMATION**

Date: Wednesday, December 14

Time: 6:00 PM

Dinner: Jan will have some nice warm soup for us. Please indicate in your RSVP if would like to bring hors d'oeuvres, dessert, bread or wine to share.

Location: Jan Duffy's house  
3014 Roxboro Dr  
Ames, IA 50014  
515-708-0509

RSVP: An e-vite was sent out

**\*\*We will be doing a white elephant gift exchange if you would like to participate.**

**\*Directions: North from campus on Stange Road to Bloomington Road. West (left) on Bloomington to the first right which is Chilton. North (right) on Chilton to the second left which is Roxboro. Turn west (left) onto Roxboro. It's the third house on the left. Must park on the North side of the street or you will get a ticket!**

**NOVEMBER 2011 MINUTES**

November Minutes  
American Society of Women  
Accountants  
Ames Chapter #158  
Membership Meeting  
November 16, 2011

Call to Order: The November Membership Meeting of Ames Chapter #158 was called to order by President Lisa Palmersheim in Ames at 7:47 p.m. on Wednesday, November 16, 2011. Those in attendance were members Cheryl Carlile, Kayla Christensen, Jan Duffy, Linda Herman, Ann Kurtenbach, Haiyan Li, Soma Mitra, Marilyn Moehlmann, Catherine Mulder, Lisa Palmersheim, Stephanie Roscoe, Sue Rybolt, Theresa Samson, and Lisa Shen. A quorum was present.

Minutes: Stephanie Roscoe moved and Jan Duffy seconded that the September minutes be approved. Motion carried.

Treasurer's Report: Stephanie Roscoe, filling in for Treasurer Penny Strum, presented the treasurer's report for October. The Scholarship Account earned \$2.07 in interest. Net income from the joint meeting with the Des Moines chapter was \$37.87. Dues income was \$61.50. A \$500 check was written to the National Education Foundation and taken to the Annual Conference. The October 31<sup>st</sup> balance



American Society of Women Accountants



Volume 7, Number 4

December 2011

Ames Chapter #158

Websites

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

Local: <http://amesaswa.org>

in the General Account was \$16,156.90 and the balance in the Scholarship Account was \$5,307.09. The treasurer's report has been placed on file for review.

Committee Reports

Membership: Haiyan Li reported that we have 30 active members. Upcoming Networking Luncheons are January 12<sup>th</sup> at Panera Bread, February 28 at The Café, and March 9<sup>th</sup> at Hickory Park.

Program: Kayla Christiansen reported that our December meeting will be our annual holiday party. Jan Duffy will host the party at her house. The date was moved from December 21<sup>st</sup> to December 14<sup>th</sup>. Bring a wrapped gift for the gift exchange. Jan will provide the soup. A sign-up sheet was passed around and Jan will create a Doodle for sign up.

Our annual planning meeting is July, not June. We have five meetings scheduled with CPE. Our goal is have seven meetings per year which would qualify for CPE. A discussion ensued as to what qualifies for CPE credit.

Bulletin: No report.

Scholarship: Jan Duffy reported that she will get the application out within two weeks. The Scholarship Committee will collect the applications and present

them at the January meeting. Currently, there is a January 1<sup>st</sup> deadline for the scholarship applications. Jan will check to see when the National deadline is and will move the deadline to submit applications to February 1<sup>st</sup> if possible. If the application deadline is moved to February 1<sup>st</sup>, the applications will be presented at the February meeting.

Do we want to transfer money from the General Account to the Scholarship Account? This will be an agenda item at our January meeting.

Jan reported that she would like our ASWA Chapter to host a 4 hour conference for Treasurers of Not For Profit Organizations. She suggested charging \$75 per person with a goal of 100 attendees.

Outreach: Karen Jacobsen and Brenda O'Neall-Smith were not present. Cheryl Carlile reported that the Boys and Girls Club and YSS are still very interested in the Financial Literacy Program and would like to pick out a module for ASWA to present.

Old Business:

ASWA Annual Conference: Kate Mulder and Soma Mitra reported on their experiences at the National Conference in Charlotte, North Carolina. Soma appreciated receiving our chapter's complementary registration. Kate is our National Vice President and



American Society of Women Accountants



Volume 7, Number 4

December 2011

Ames Chapter #158

Websites

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

Local: <http://amesaswa.org>

nominated our chapter for the Chapter Achievement Award and we were chosen for this award. Soma accepted this award for our chapter at the Awards Luncheon. We received a "Chapter Achievement Award 2011" patch. We also received the National Membership Award 2010-2011 which is an award for 90% member retention.

New Business:

ASWA Focus Group: Kate reported that the National ASWA organization would like ASWA members to participate in focus groups of up to 20 people. This would take place some evening or a Saturday. We would need to watch a You Tube presentation in preparation and our board members would act as facilitators. We would then report back to the National Executive Committee. Kate will draft an e-mail and send out to the membership. Possibly we could do this during a membership meeting. Kayla will check to see if Toni Bright will be available to present a program at our January meeting. The offer has already been extended. If she will not be presenting, we could conduct the focus group at our January meeting. Otherwise, Kate will choose three dates and let members respond.

Announcements: Stephanie reported that Indian Creek Country Club in Nevada manager, Sherry Newsome, is a PGA professional and she is offering her services. Women's League is on

Wednesdays and we could play the first four holes and she would give tips and help with golf techniques. Do we want to have a meeting there in the future?

Adjournment: Meeting Adjourned at 8:30 p.m.

Respectfully submitted,  
Ann Kurtenbach, Secretary

SCHOLARSHIP NEWS

None

PROGRAM SCHEDULE

**A big thanks to Jan for hosting the Holiday Party!**

**We will hold a focus group meeting on "The Face of ASWA" on Jan. 18th for our monthly meeting. See Evite for location.**

**February:** Abhi Rao, Communications Specialist from Iowa State University will present "Tips on Good Email vs. Bad Email"

**March:** We will have a joint meeting with the Institute of Management Accountants. Lisa Palmersheim will present "Behavioral Interviewing".



American Society of Women Accountants

# THE SPOKESWOMAN

Volume 7, Number 4

December 2011

Ames Chapter #158

### Websites

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

Local: <http://amesaswa.org>

**April:** OPEN – Ideas range from 5 Legal Secrets Every Smart Woman Should Know, State tax issues, Women Mentoring Women, Investments/Retirements 101, Identity Theft – Any new ideas or preferences would be welcome!

**May:** Cyndi Jeffrey, Iowa State University Associate Professor, will present “Tax Policy Motivates Desired Outcomes – Including Reducing Greenhouse Gases”

**June:** Planning Meeting

### NETWORKING LUNCHES

Future Networking Lunches :

All lunches will be held at noon.

- Thur 1/12/12 Panera Bread
- Tue 2/28/12 The Café
- Fri 3/09/12 Hickory Park
- Wed 4/25/11 Stomping Grounds

### QUOTE OF THE MONTH

The only gift is a portion of thyself.

~Ralph Waldo Emerson

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