



American Society of Women Accountants



Volume 7, Number 7

March 2012

Ames Chapter #158

Websites

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

Local: <http://amesaswa.org>

AMES CHAPTER OFFICERS

President: Lisa Palmersheim
Email: president@amesaswa.org

Vice President: Soma Mitra
Email: vice-president@amesaswa.org

Secretary: Ann Kurtenbach
Email: secretary@amesaswa.org

Treasurer: Penelle Strum
Email: treasurer@amesaswa.org

Past President: Marilyn Moehlmann
Email: past-president@amesaswa.org

Program: Kayla Christensen
Cheryl Carlile
Email: programs@amesaswa.org

Membership: Cindy Sippel
Haiyan Li
Email: membership@amesaswa.org

Newsletter: Carla Danielson
Email: bulletin@amesaswa.org

Scholarship: Jan Duffy
Lin Shen
Penelle Strum, Treasurer
Email: 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
March, 2012

It looks like we will have an early spring this year. Over the weekend, I noticed all the bugs starting to crawl out of the woodworks. Let's hope there isn't one more snow storm awaiting us.

March's joint meeting with the IMA should be a fun one. We will be having a chance to socialize and network over a glass of wine during the wine tasting prior to our meeting. I am also putting the last minute touches on my presentation. I am working a little interaction into my presentation that should be a fun!!

We will also be having a short business meeting after the adjournment of our joint meeting. There are a few agenda items that we need to discuss and vote upon this month. It is very important that we have members attend this meeting, since we have been unable to have a quorum the past few



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months. We have deadlines approaching in the next few weeks, such as our scholarship application to Nationals, that need to be addressed this month.

Hope to see you all there.

Lisa Palmersheim
President

AGENDA

AGENDA – March 20, 2012

1. Call to Order
2. Quorum
3. Approval of Minutes – November 2011
4. New Business
 - a. Scholarship Recipients
 - b. Local chapter dues rate for 2012-2013 – Current Rate \$20.50
 - c. Election of Officers and Directors
7. Announcements
 - a. 2012 North Central Regional Conference May 10-12 2012
8. Adjournment

MEETING INFORMATION

Joint Meeting with the Des Moines Chapter IMA

Date: Tuesday, March 20th

Time: 5:30-6:00 Wine Tasting;
6:00 – buffet dinner and presentation (short chapter meeting after)

Presenter: Lisa Palmersheim

Topic: “Behavioral Interviewing”

Location: White Oak Vineyards Iowa
15065 NE White Oak Drive
Cambridge, IA 50046
Phone: (515) 367-7777

Dinner: Smoked pork loin, honey citrus chicken breast, glazed carrots, baked mac & cheese, lettuce salad w/ dressing

Cost: The charge will be \$20 at the door. Water is provided with the meal, but if guests would like wine with their meal, they can purchase a bottle after their wine tasting.

RSVP: An e-vite has been sent out. We need the dinner count by Wednesday, March 14th, so please RSVP as soon as possible.

NOVEMBER 2011 MINUTES

November Minutes
American Society of Women Accountants
Ames Chapter #158



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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 31st balance 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 12th at Panera Bread, February 28 at The Café, and March 9th 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 21st to December 14th. 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 1st 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 1st if possible.



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If the application deadline is moved to February 1st, 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'Neill-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. Penny Strum and Stephanie Roscoe nominated our chapter for the Chapter Achievement Award and we were chosen to receive this award. Kate Mulder, National Vice President, presented the award at the Awards Luncheon. Soma accepted on behalf of

our chapter. 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?



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

Respectfully submitted,
Ann Kurtenbach, Secretary

OFFICER NOMINATION 2012-2013

ASWA - Ames Chapter
Nominations for 2012-2013

President	Soma Mitra
Vice President	Kayla Christensen
Secretary	Ann Kurtenbach
Treasurer	Kathy Strum
Past President	Lisa Palmersheim
Programs	Marilyn Moehlmann Linda Herman
Membership	Haiyan Li Julie Lyon
Newsletter	Carla Danielson
Scholarship	Jan Duffy Jaimie Williamson Kathy Strum

SCHOLARSHIP NEWS

None

FINANCIAL LITERACY

Update on Financial Literacy

We will be working with the Keystone Club of the Boys & Girls Club of Story County (located in Ames) and we (Karen and Brenda) will be presenting our first module (#3 – Setting Financial Goals) the first two weeks of April on Tuesdays from 6-7 pm. These kids are basically high schoolers developing leadership skills and the maximum number in the group is 12, with 6-8 generally attending on any given night. We met with Todd Jorgensen of the Club on March 2 and got everything arranged. They have the necessary equipment and will make all the participant copies. We have agreed to do one module a quarter and each module will be presented by two ASWA members, one of which will have been there before. This way the kids have some continuity. The students will choose the next module to be presented. We will ask for a presenter once that is determined.

Brenda O’Neill-Smith
Karen Jacobson
Co-Chairs

PROGRAM SCHEDULE

April: Natalie Lischer, Treasurer of Renewable Energy Group, will present on the process of taking a company public!
April event w/ ISU students: Toni Bright,



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THE SPOKESWOMAN

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Iowa Board of Accountancy Executive Officer, will present "A CPE Requirements Update"

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

June: Mary Jo Gonzales, Iowa State University Assoc Dean of Students/Director of Academic Success Center, will present "Queen Bees, Tall Poppies, and Drama Queens: Avoiding the pitfall of women mentoring women"

July: Planning Meeting

NETWORKING LUNCHES

Future Networking Lunches :

All lunches will be held at noon.

Wed 4/25/11 Stomping Grounds

QUOTE OF THE MONTH

To reach a port we must sail, sometimes with the wind and sometimes against it. But we must not drift or lie at anchor.

~**Oliver Wendell Holmes**

Articles and submissions to the newsletter are welcome. Please contact Carla at bulletin@amesaswa.org