



American Society of Women Accountants

THE SPOKESWOMAN

Volume 8, Number 1

August 2012

Ames Chapter #158

Websites

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

Local: <http://amesaswa.org>

AMES CHAPTER OFFICERS

President: Soma Mitra
Email: president@amesaswa.org

Vice President: Kayla Christensen
Email: vice-president@amesaswa.org

Secretary: Ann Kurtenbach
Email: secretary@amesaswa.org

Treasurer: Kathy Strum
Email: treasurer@amesaswa.org

Past President: Lisa Palmersheim
Email: past-president@amesaswa.org

Program: Marilyn Moehlmann
Linda Herman
Email: programs@amesaswa.org

Membership: Haiyan Li and Julie Lyon
Email: membership@amesaswa.org

Newsletter: Carla Danielson
Email: bulletin@amesaswa.org

Scholarship: Jan Duffy
Kathy Strum
Jamie Williamson
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

Ames gets energized and vibrant with the start of the school year in August, the downtown starts teeming with shoppers and cafes start buzzing with students and visitors the campus town comes to life. This is always one of the most exciting times of the year for Ames residents, as new and returning students come to campus during this time of the year at Iowa State University with new vigor, new hopes and dreams of building a great future.

It is also the time for the start of the new K-12 school year as well. I have a tenth grader and an eighth grader in Ames High School and so I feel the excitement of the school-age students and anxiety of the parents as well.



American Society of Women Accountants



Volume 8, Number 1

August 2012

Ames Chapter #158

Websites

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

Local: <http://amesaswa.org>

It is also the start of a new ASWA year and I am thrilled to have all of you back! WELCOME!

This year, one of the goals of ASWA in the area of Business Growth Partnership Program is to create and foster a national alignment between ASWA and MassMutual. This involves building a network of local market partnerships between ASWA members and MassMutual financial professionals. I am excited about this partnership as I believe it will be mutually beneficial for both organizations.

Thanks to all who are serving in committees this year. Thank you for all you do for our chapter and organization. Your dedication for the chapter is very much appreciated.

It is truly an honor to serve as the President of this chapter and here's to another great year!

Soma Mitra

AGENDA

August meeting Agenda

- 1. Call to Order
- 2. Quorum
- 3. Approval of Minutes
- 4. Treasurer's Report
- 5. Committee Reports
 - a. Membership

- b. Program
- Joint Meeting with Des Moines Chapter
- Joint Meeting with IMA
- c. Bulletin
- d. Scholarship
- e. Outreach
- 6. Old Business
 - a. Financial Literacy progress report – Karen Jacobson
- 7. New Business
 - a. 2012 ASWA Annual Business Meeting Delegates
 - b. ASWA partnership with MassMutual
- 8. Announcements
- 9. Adjournment

MEETING INFORMATION

Date: Wednesday, August 15th

Time: 6:00 PM

Topic: Team Building Games

Location: Buford's Steakhouse/Quality Inn
2601 East 13th

JUNE 2012 MINUTES

Minutes
American Society of Women
Accountants
Ames Chapter #158
Membership Meeting
June 20, 2012



American Society of Women Accountants



Volume 8, Number 1

August 2012

Ames Chapter #158

Websites

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

Local: <http://amesaswa.org>

Call to Order: The June Membership Meeting of Ames Chapter #158 was called to order by President Lisa Palmersheim in Ames at 7:25 p.m. on Wednesday, June 20, 2012. Those in attendance were members Linda Herman, Karen Jacobson, Ann Kurtenbach, Soma Mitra, Marilyn Moehlmann, Catherine Mulder, Margaret Munson, Jordan Nolta, Brenda O'Neall-Smith, Lisa Palmersheim, Cindy Sippel, Kathy Strum, and Jaimie Williamson. A quorum was present.

Minutes: Jamie Williamson moved and Marilyn Moehlmann seconded that the May minutes be approved. Motion carried.

Treasurer's Report: No report

Committee Reports:

Membership: Cindy Sippel reported that we have 29 members.

Program: No report

Bulletin: No report

Scholarship: No report

Old Business:

Financial Literacy Progress Report – Karen Jacobson reported that she spoke with Boys and Girls Club Program Director, Todd Jorgensen. He would

like the FDIC Program, *Paying for College and Cars* module presented this fall. A decision will be made in September when to hold the class which will be presented in two evenings. The class will be led by one experienced person and one other person. Contact Karen if anyone is interested in helping with these classes.

The ISCPA offers the *Money Mammals* program to preschool and kindergarten children to teach about saving, sharing, and spending. Kate Mulder, Stephanie Roscoe and Kathy Strum each taught two classes to kindergarten students.

Proposed ASWA Name Change – After discussion, the thirteen members present participated in a straw poll on whether or not to support a proposal to change our name to Accounting and Financial Women's Alliance. The results of the straw poll were 8 Yes, 2 No, and 3 Undecided.

New Business:

Update on Regional Conference - Omaha – Six members attended the regional conference in Omaha June 8-9: Karen Jacobson, Kate Mulder, Stephanie Roscoe, Cindy Sippel, Penny Strum and Kathy Strum. There were 76 registered conference attendees including the national board members. Our members reported that the conference had excellent speakers, a



American Society of Women Accountants



Volume 8, Number 1

August 2012

Ames Chapter #158

Websites

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

Local: <http://amesaswa.org>

good facility, and the Omaha chapter members took the conference attendees around the city. People attended from all over the country. Our chapter furnished a basket for the silent auction. The money raised from the silent auction averaged \$78 per attendee. The Foundation was the recipient of the auction proceeds.

Kate Mulder will be installed as National President at the Richmond, VA regional conference to be held on May 3-4, 2013.

Member of the Year – Brenda O’Neill-Smith was chosen as Member of the Year for her work as Co-Chair of the Financial Literacy Program.

Installation of Officers – President Lisa Palmersheim thanked the outgoing 2011-2012 board members for their service to the chapter. The 2012-2013 board was installed.

2012-2013 Board Members
President – Soma Mitra
Vice President – Kayla Christensen
Secretary – Ann Kurtenbach
Treasurer – Kathy Strum
Past President – Lisa Palmersheim
Program – Marilyn Moehlmann and Linda Herman
Membership – Haiyan Li and Julie Lyon
Newsletter – Carla Danielson
Scholarship – Jan Duffy, Kathy Strum and Jamie Williamson

July Planning Meeting – Linda Herman volunteered to host the July planning meeting on July 18th. Her address is 1514 NW Maple Place in Ankeny. Attending members should bring something to share for the pot luck meal which will consist of salads, bread, cheese, and desserts.

National ASWA Nominating Committee – Cindy Sippel motioned and Brenda O’Neill-Smith seconded to nominate Karen Jacobson by our chapter for the National ASWA Nominating Committee at the Annual Conference in San Diego. The motion was approved by unanimous consent.

Announcements:

The 2012 ASWA Annual Conference will be held in San Diego, CA October 22-24.

Adjournment: Meeting adjourned at 8:25 p.m.

Respectfully submitted,

Ann Kurtenbach, Secretary



Minutes
American Society of Women
Accountants



American Society of Women Accountants



Volume 8, Number 1

August 2012

Ames Chapter #158

Websites

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

Local: <http://amesaswa.org>

Ames Chapter #158
Planning Meeting
July 18, 2012

A potluck planning meeting was held at Linda Herman's home in Ankeny on Wednesday, July 18, 2012. Those in attendance were members Kayla Christensen, Linda Herman, Karen Jacobson, Ann Kurtenbach, Soma Mitra, Marilyn Moehlmann, Catherine Mulder, Lisa Palmersheim, Cindy Sippel, Kathy Strum, Penny Strum and Jaimie Williamson.

Kate Mulder passed out an ASWA Chapter Self-Assessment Scorecard, which we reviewed and completed.

The areas reviewed were:

- ✓ Are all Officer Positions filled?
- ✓ Do you have two or more new Board members or Committee Chairs for the upcoming year?
- ✓ Do the majority of your committees have more than one committee member?
- ✓ Do you have an annual planning meeting scheduled?
- ✓ Retention %
- ✓ Recruitment %
- ✓ Meeting Attendance
- ✓ Meeting Attendance Expectations
- ✓ Chapter Reporting

We gave our chapter a score of 89 out of 100. A chapter is considered an

"excellent chapter" with a score of 85 or above. Recruitment (16%) and Meeting Attendance (30-39%) are the two areas we will work to improve. Last year, we were not able to hold a business meeting twice because of lack of a quorum. Our chapter has a history of filling officer positions and encouraging new members to accept positions within our chapter. We have three new members on our board this year: Linda Herman – Programs, Julie Lyon – Membership, and Jaimie Williamson – Scholarship. The Programs, Membership, and Scholarship committees have more than one person which is desired.

Chapter goals for next year:

- At least 7 meetings with CPE credit (We had 8 meetings with CPE credit last year)
- Net growth of 2 members
- Average of 40% meeting attendance

Membership – We currently have 29 members and our goal is to end the chapter year with at least 31 members.

Suggestions for the Membership Committee:

- Publicize meetings – newspapers, Facebook, LinkedIn, press release, Business Times
- Reach out to Beta Alpha Psi
- Personal Invitations



American Society of Women Accountants



Volume 8, Number 1

August 2012

Ames Chapter #158

Websites

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

Local: <http://amesaswa.org>

Suggestions for Newsletter Committee:

- Bulletin should be sent out by Monday of the week before the meeting – 9 days prior – to give sufficient notice to nonmembers who do not have the meetings on their calendars.

We **all** need to work on encouraging our members to attend our meetings. With membership between 29 (current) and 31 (chapter goal), we will need 12-13 members to attend each meeting to achieve our 40% attendance goal.

Suggestions for future CPE /speakers /topics:

- Toni Bright – Iowa Accountancy Examining Board
- Kristy Maitre – IRS
- Iowa State University Extension – Story County – Who Gets Grandma’s Yellow Pie Plate? Six key factors in transferring non-titled property.
- Financial planning
- Succession planning
- Bill Dilla
- Fraud – Peregrine Financial Group, Cedar Falls, IA – Russell Wasendorf Sr.
- Indian Creek Country Club golf outing, Nevada

– Sherry Newsome, Club Manager

- Jan Duffy
- FBI

Contact Marilyn Moehlman and Linda Herman with suggestions for future programs.

Our choice of places to hold meetings is getting smaller. Pazzesco Pasta and Chophouse and Legends American Grill have closed.

Our chapter does not meet in August. Typically, January has the worst weather and the lowest attendance. Many accountants are busy with payroll tasks that month. We discussed the possibility of meeting in August instead of January and will attempt that this year. If the Program Committee is successful, we will not meet in January. Otherwise, we will implement this change in FY14.

Lisa Palmersheim is interested in helping Karen Jacobson and Brenda O’Neill-Smith with presenting the next module in the Financial Literacy program to the Boys & Girls Club of Story County.

October is our joint meeting with the Des Moines Chapter and it is their turn to host.

Respectfully submitted,



American Society of Women Accountants



Volume 8, Number 1

August 2012

Ames Chapter #158

Websites

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

Local: <http://amesaswa.org>

Ann Kurtenbach, Secretary

PROGRAM SCHEDULE

Date: Wednesday, August 15th

Time: 6:00 PM

Topic: Team Building Games

Location: Buford's Steakhouse/Quality Inn
2601 East 13th

NETWORKING LUNCH SCHEDULE

OUTSTANDING MEMBER OF THE YEAR

Brenda O'Neall-Smith was awarded the Outstanding Member of the Year award at the June meeting held on Wednesday, June 20, on the ISU campus. Brenda was instrumental in starting the Chapter's Financial Literacy Program this year. The Ames Chapter is working with the Boys & Girls Club of Story County and is presenting various modules of the FDIC Money Smart for Young Adults Financial Education Program. The first module presented was Setting Financial Goals and was given to the Keystone Leadership group at the club. The next module to be presented will be Paying for College and Cars. Brenda was a presenter at both sessions and will be training future presenters in the program. She has been a long-time member of the Ames Chapter and has served in various capacities over the years, including President. Thank you, Brenda, for your work in this area and congratulations!

Contact Information for Karen Jacobson

I am retiring on Friday, August 10th, from the Leopold Center at ISU. If you need to get in touch with me after that date, please contact me either on my

Date	Restaurant	Location	RSVP by Noon on
Mon. 9/24/12	Old Main Brewing	316 Main St.	Fri 9/21/12
Tue 10/23/12	Aunt Maude's	547 Main St.	Mon 10/22/12
Fri 11/16/12	Applebee's	105 Chestnut Street	Thur 11/15/12
Thur 1/24/13	Fuji	1614 S. Kellogg Ave. Suite 101	Wed 1/23/13
Thur 2/21/13	The Café	2616 Northridge Pkwy	Wed 2/20/13
Wed 3/13/13	Pancho's	1310 S. Duff, Suite 103	Tue 3/12/13
Fri. 4/12/13	Noodles & Company	414 S. Duff	Thur 4/11/13
Thur 5/23/13	Stomping Grounds	303 Welch Ave.	Wed 5/22/13



American Society of Women Accountants

THE SPOKESWOMAN

Volume 8, Number 1

August 2012

Ames Chapter #158

Websites

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

Local: <http://amesaswa.org>

personal e-mail
kjacob107@hotmail.com or on my cell
phone 515-460-1496. Please note that I
only have access to e-mail at the store
and I will not be there every day. I
would suggest that you try my cell
phone first before e-mail. And we are
shortly going to get rid of our home
phone. If all else fails, you can try our
store phone at 515-733-2995 from 9-6
Tuesday-Saturday. I plan to remain
active in ASWA, so will be seeing you all
at the meetings. Keep checking the ISU
website for Employment Opportunities
for the posting of my job if you are
interested. Also, THANK YOU to all of
you who came to my retirement
reception on Monday, August 6th. You
made it really special.

Karen

QUOTE OF THE MONTH

Knowing is not enough; we must
apply.
Willing is not enough; we must do.
~**Johann Wolfgang von Goethe**

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