



Accounting & Financial Women's Alliance  
CONNECT • ADVANCE • LEAD  
*Ames Chapter*

Volume 8, Number 6

February 2013

# THE SPOKESWOMAN

Ames Chapter #158

## 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

President's Message  
February Meeting

It's official! American Society for Women Accounts (ASWA) has now rebranded to Accounting & Financial Women's Alliance (AFWA)! As of Jan 31, 2013, the launch has been implemented on a national level and includes a refresh of the national website, now located at [www.afwa.org](http://www.afwa.org), all social media pages (Facebook page and Twitter feed), Accountability and News Brief e-newsletters. Be sure to "like" the new Accounting and Financial Women's Alliance Facebook Page and "follow" the new Twitter Feed. The ASWA LinkedIn group has been renamed to the "Accounting & Financial Women's Alliance" and reflects the new logo – you do not have to rejoin the group!



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With the help of the “Chapter Rebrand Packet” which contains chapter logos, website templates and resources, press releases, rebrand-related reimbursement form, the chapters are expected to rebrand and update all chapter communications by June 30, 2013.

When you are conversing with nonmembers, please use the full name, “Accounting and Financial Women’s Alliance” as opposed to the acronym whenever necessary and possible.

Looking forward to seeing you all at the February meeting!

Soma Mitra  
President  
AFWA, Ames Chapter

**AGENDA**

AGENDA – February 20, 2013

1. Call to Order
2. Quorum
3. Approval of November meeting Minutes
4. Treasurer’s Report
5. Committee Reports
  - Membership
  - Program
  - Scholarship

6. Old Business
  - Financial Literacy progress report
  - Chapter Dues rate form due in March

7. New Business
  - Chapter rebranding plan

8. Announcements
  - ASWA 2013-14 Nominated Slate
  - Quarterly Chapter Leader Report submitted to national
  - Chapter self-assessment scorecard submitted to national

9. Adjournment

**MEETING INFORMATION**

Our program for February will be a presentation titled “Pearls of Wisdom” by our own member, Barbara Bennett. Pearls of Wisdom is a video based program featuring life stories of women from different ages and different lifestyles. The stories explore the issues that many women today face including protecting themselves and their loved ones. The interactive program will focus on questions you may have personally and as a professional advising your clients. Barbara is an attorney with over 30 years in the financial services industry. She was involved in a wide range of sales, training, product development, management, compliance, and legal roles. Barbara was the President and Chief Compliance Officer for Ruan Securities Corporation. Prior to her



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long tenure in the securities industry she was an Assistant Attorney General. Barbara joined MassMutual in 2010 as an Investment Advisor Representative. In addition to her securities and RIA business helps clients with their life, disability, and long-term care insurance needs. She is a MassMutual Certified CPE instructor for the state of Iowa. MassMutual is an Honorary Trustee of AFWA. The meeting will be held at NewLink Genetics Corporation at 2503 South Loop Drive in Research Park, just west of the airport. The meal will be catered by The Café and cost between \$12 and \$15. Watch for the Evite for more details.

**NOVEMBER 2012 MINUTES**

Minutes  
American Society of Women  
Accountants  
Ames Chapter #158  
Membership Meeting  
November 14, 2012

Call to Order: The November Membership Meeting of the Ames Chapter #158 was called to order by President Soma Mitra in Ames at 7:35 pm on Wednesday, November 14, 2012. Those in attendance were members Kayla Christensen, Jan Duffy, Ann Kurtenbach, Soma Mitra, Marilyn Moehlmann, Margaret Munson,

Kate Mulder, Lisa Palmersheim, and Barbara Bennett, One guest was also in attendance: Maggie Schlerman. A quorum was present.

Minutes: Jan Duffy moved and Marilyn Moehlmann seconded that the September minutes be approved as written. Motion carried. There was no membership meeting during October because of the joint meeting with the Des Moines Chapter.

Treasurer's Report: None. Soma Mitra reported that Kathleen Strum has resigned as treasurer. Penny Strum has resigned as her assistant. Soma will ask Karen Jacobson to serve as treasurer. If she agrees to accept the position Soma will appoint her to serve as treasurer until June 30<sup>th</sup>, 2013. Our chapter will accept her appointment if she accepts the position. Kathleen Strum and Penny Strum will be removed from the signature card at US Bank. Soma Mitra and Karen Jacobson will be added to the signature card.

Committee Reports

A. Membership: No report. We currently have 28 members.

B. Program:



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- a. Marilyn Moehlmann reported that Linda Herman has programs lined up for the remainder of the year.
  - b. Christmas Party – Our annual Christmas party will be held December 19<sup>th</sup>. We are looking for someone to host or ideas on an alternate location. Kate Mulder mentioned that we could meet at a restaurant. A note will be sent out asking if anyone want to host.
- C. Bulletin: No report.
- D. Scholarship: Jan Duffy reported that the scholarship application will be updated and be sent out shortly. Margaret will get the application on the website when it is ready. Jan will serve as Chair. Jaimie Williamson and the new treasurer will serve on the Scholarship Committee.

### Old Business

- A. Financial Literacy progress report: Lisa Palmersheim reported that the Boys and Girls Club requested that we wait until February to present the module *Paying for College/Cars* because the club members now have basketball practice.

- B. Bulletin Archival Process: Margaret Munson previously sent out a list of the missing bulletins. If anyone has any of the missing bulletins, please send her the electronic version or a paper version and she will scan.

### New Business

- A. Holiday Party – already discussed.

### Announcements

- A. Update on ASWA National Conference at San Diego: Kate Mulder was the moderator of the by-laws forum. The name change passed. They are working on a timeline to get the name changed. The name change needed to pass by a 2/3 majority. It passed by about 70%. Our chapter had three votes. The votes were cast as follows to reflect the straw poll from our chapter: Yes – 2, No – 1. Soma nominated Karen Jacobson for the Nominating Committee next year. Karen gave a nice speech and was elected. Our chapter received a 2011-2012 Financial Literacy Program award. Five presentations of *Money Mammals* were given to 240



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students by Stephanie Roscoe, Kathy Strum and Kate Mulder. The *Money Smart Program* was presented to the Boys and Girls Club in Ames by Cindy Sippel, Karen Jacobson and Brenda O'Neill-Smith. Our chapter donated \$500 to the Foundation.

B. ISU Accounting Conference, December 14<sup>th</sup> – Registration is now open.

Adjournment: Meeting adjourned at 8:20 p.m.

Respectfully submitted,

Ann Kurtenbach, Secretary

### PROGRAM SCHEDULE

February – Barbara Bennett, Mass Mutual

March – TBA

April 17<sup>th</sup> – “Who gets Grandma’s Yellow Pie Plate”

May 15<sup>th</sup> – Jodi (Adams) Baker – Administrative Accounting Rules

(Formerly with the Iowa Licensing Bureau)

June 19<sup>th</sup> – Special Agents Dani Coleman & Beth Thompson, IRS

These agents are involved in tax fraud cases that involve prison sentences.

### NETWORKING LUNCH SCHEDULE

Date	Restaurant	Location	RSVP by Noon on
Thur 2/21/13	The Café	2616 Northridge Pkwy	Wed 2/20/13
Wed 3/13/13	Panchero'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

### QUOTE OF THE MONTH

"Whether you think that you can, or that you can't, you are usually right."  
~ Henry Ford (1863-1947)

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