



Volume 8, Number 10

June 2013

THE SPOKESWOMAN

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: Karen Jacobson
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
Email: membership@amesaswa.org

Newsletter: Carla Danielson
Email: bulletin@amesaswa.org

Scholarship: Jan Duffy
Karen Jacobson
Jaimie 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

President's Message
June 2013

The year has gone by at the speed of lightning. I want to review the goals that we had set for the chapter and evaluate our success in reaching those goals. Here are our chapter goals and what we have achieved:

- At least 7 meetings with CPE credit (We will have 8 meetings with CPE credit this year including the June 19th meeting!!). Here is a summary of the variety of CPE topics we offered:
 - ✓ August – Team Building
 - ✓ September – KPMG Fraud presentation



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- ✓ October – Joint Meeting
David Vaultd
 - ✓ November – Kristy
Maitre
 - ✓ February – Barbara
Bennett – Pearls of
Wisdom
 - ✓ April – Barb Wollan –
who gets Grandma's
yellow pie plate
 - ✓ May – Jodi Baker –
License requirements.
 - ✓ June – IRS special agents
- Average of 40% meeting attendance (Our average meeting attendance was at least 12 in all meetings (with one exception), which is greater than 40%!! No meetings cancelled due to low attendance!!)
 - We had 29 members beginning of this year and our goal is to end the chapter year with at least 31 members. (We have 30 members currently. We had a net gain of 1!!)
 - Publicize our chapter events and meeting (Our scholarship recipients were featured in the local newspapers!! Special Thanks to Jaimie Williamson!)
 - Send out bulletin earlier (We have been sending the bulletin out 3-4 days earlier than last year!! Special Thanks to Carla Danielson!)
 - Financial Compliance with regard to signature authority (The chapter has been compliant since January 2013!! Special thanks to Kate Mulder and Karen Jacobson!)
- Wow what a great year! Kudos to our board and committee members for a wonderful year!
- In spite of several committee members resigning due to medical issues, the chapter has been functioning without missing a beat – thanks to all our out-going chapter board and committee members for their hard work and dedication this year.
- Kayla Christensen: Vice-President
Ann Kurtenbach: Secretary
Past President: Lisa Palmersheim
Treasurer: Karen Jacobson
Program: Marilyn Moehlmann & Linda Hermann
Membership: Haiyan Li
Newsletter: Carla Danielson
Scholarship: Jan Duffy, Karen Jacobson, Jaimie Williamson
- Your dedication to the organization and the chapter is much appreciated!
- Hope to see you at the next meeting!
- Soma Mitra



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AFWA Ames Chapter
 President 2012-2013

AGENDA

AGENDA – June 19, 2013

1. Call to Order
2. Quorum
3. Approval of Minutes
4. Treasurer's Report
5. Committee Reports
 - a. Membership
 - b. Program
 - c. Bulletin
 - d. Scholarship
6. Old Business
 - a. Financial Literacy progress report
 - b. New name tags
 - c. Re-branding committee progress report
7. New Business
 - a. Update on the Regional Conference
 - b. Member of the Year
 - c. Installation of Officers
 - d. July Planning meeting
 - e. TBD

MEETING INFORMATION

The meeting will be at 5:30 Wednesday, June 19th in Room 2118 of Gerdin Hall on the ISU campus.

Our speaker, Dani Coleman, is currently a Special Agent with IRS criminal investigation and has been employed as such since 2006. She was previously a Revenue Agent with IRS and worked in corporate accounting for 10 years prior to her IRS employment. She holds a Bachelor's degree in accounting and a CPA license in the state of Iowa. The meal will be catered by The Café.

OFFICER NOMINATIONS

	Current Officers	Nominations
President	Soma Mitra	Kayla Christensen
Vice President	Kayla Christensen	Theresa Sampson
Secretary	Ann Kurtenbach	Cindy Sippel
Treasurer	Karen Jacobson	Karen Jacobson
Past	Lisa Palmersheim	Soma Mitra



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President

Program Marilyn Moehlmann Jan Duffy
 Linda Herman Marilyn Moehlmann

Membership Haiyan Li Lisa Palmersheim
 Julie Lyon Linda Borst

Newsletter Carla Danielson Brenda O'Neall-Smith

Scholarship Jan Duffy Jamie Williamson
 Karen Jacobson Karen Jacobson
 Jamie Williamson Carla Danielson

Web Master Margaret Munson Margaret Munson

Herman, Karen Jacobson, Ann Kurtenbach, Soma Mitra, Marilyn Moehlmann, Kate Mulder, Margaret Munson, Lisa Palmersheim, Theresa Samson, Cindy Sippel, Jaimie Williamson. A quorum was present.

Also in attendance were four guests: Elizabeth Bruns, Katy Farlow, Helen Meyerhoff and Qian Wang.

Minutes: Kate Mulder moved that the minutes of the April meeting be approved as corrected. The motion was seconded by Cindy Sippel. Motion carried.

Treasurer's Report: Karen Jacobson handed out the treasurer's report. The balance in the General Account is \$8,636.89. The balance in the Scholarship Account is \$7,620.34.

Committee Reports:

- A. Membership – No Report. There are currently 31 members.
- B. Program: Linda Herman reported that our June speakers will be Special IRS Agents. We will also install the officers for the 2013-2014 year and present the Member of the Year Award. July 17th will be our planning meeting.

MAY 2013 MINUTES

Minutes
 Accounting and Financial Women's
 Alliance
 Ames Chapter #158
 Membership Meeting
 May 15, 2013

Call to Order: The May Membership Meeting of the Ames Chapter #158 was called to order by President Soma Mitra in Ames at 7:05 p.m. on Wednesday, May 15, 2013. Those in attendance were members Barbara Bennett, Linda Borst, Cheryl Carlile, Kayla Christensen, Jan Duffy, Linda



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C. Scholarship: Jamie Williamson reported that a press release will be sent to the ISU Daily, Story County Sun, Ames Tribune, Nevada Journal, Boone News-Republican and Marshalltown Times-Republican newspapers. It will contain a picture of our scholarship recipients and a caption "Accounting and Financial Women's Alliance Honors 2013 Scholarship Award Recipients."

D. Bulletin: No Report.

Old Business:

A. Financial Literacy progress report: No report.

B. Election of Officers and Directors for 2013-2014: The following slate of officers have been nominated:

President: Kayla Christensen

Vice President: Theresa Samson

Secretary: Cindy Sippel

Treasurer: Karen Jacobson

Past President: Soma Mitra

Program: Jan Duffy and Marilyn Moehlmann

Membership: Lisa Palmersheim and Linda Borst

Newsletter: Brenda O'Neill-Smith

Scholarship: Jaimie Williamson, Karen Jacobson, and Carla Danielson

Webmaster: Margaret Munson

Jan Duffy moved that we accept the slate of officers by unanimous consent. Kate Mulder seconded. Motion carried.

C. Rebranding Efforts: We need to hold a launch party before September 30th. Soma Mitra asked for ideas. Theresa Samson, Lisa Palmersheim and Barbara Bennett volunteered for this committee.

D. Chapter Website: Margaret reported that an addendum to the bulletin is on the website. She will post the slate of officers.

New Business: None

Announcements:

- Margaret Munson and Karen Jacobson attended the Regional Conference in Richmond, VA May 3-4, 2013. Kate Mulder was installed as National President. There were fantastic speakers at the conference.
- Karen Jacobson will be installed as a Director on the Education Foundation Board at the Southwest Regional Conference in Denver May 30-31, 2013.
- The National conference will be in Indianapolis, IN October 20-23, 2013.



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- The Southwest Regional Conference will be May 15-16, 2014 in Flagstaff, AZ.
- There will be a People to People delegation to South Africa in November.
- Our next meeting will be Wednesday, June 19th.

Adjournment: Meeting adjourned at 7:40 p.m.

Respectfully submitted,

Ann Kurtenbach, Secretary

MEMBERSHIP REPORT

Membership programs from National:

1. Shoot for the Stars campaign: chapter can win \$1,000 by retaining at least 80% of the membership and earning 7.5% net increase in total membership since last fiscal year.
2. Individual Stargazer Award: individual members may compete for a chance to win a Kindle Fire or an iPad each time they recruit a new member.
3. Starburst Bonus Campaign: is designed to encourage chapters to develop creative events and marketing around the launch of our new name, Accounting & Financial Women's Alliance. This campaign rewards

the most creative and successful chapters with cash prizes!

PROGRAM SCHEDULE

June 19th – 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 5/23/13	Stomping Grounds	303 Welch Ave.	Wed 5/22/13

QUOTE OF THE MONTH

Nothing great was ever achieved without enthusiasm.

~ Ralph Waldo Emerson

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