



Accounting & Financial Women's Alliance

CONNECT • ADVANCE • LEAD

Ames Chapter

Volume 9, Number 8

March 2014

THE SPOKESWOMAN

Ames Chapter #158

Websites

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

Local: <http://amesafwa.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.

MEETING INFORMATION

Career as Financial Advisor

Marin Felz

Wednesday, March 19th

Lucullans

400 Main St., Ames

About our Presenter: Marin Felz

I was raised in Coral Springs, FL. I then attended Colorado State University where I earned a B.S. in Soil & Crop Sciences and Agricultural Economics. Upon graduation, I began working for Farm Credit Services as an Agricultural Lender, providing both production agriculture loans and farm and ranch land financing. I then obtained an M.B.A. from the University of Colorado at Colorado Springs with a Finance specialty. I began my Edward Jones career in 2010 here in Ames. As a Financial Advisor, I assist my clients in creating and implementing investment plans to reach their long term goals. I hold a Series 7 and Series 66 license, as well as Insurance

License. I also serve the Firm as the WINGS Leader for an area across Central Iowa. WINGS stands for Women's Initiative for New Growth Strategies. In this role, I strive to raise awareness of the Edward Jones opportunity for women, identify qualified women, and support them through the decision process and in the early phases of their career. My husband, Charles, is a Veterinarian here in Ames, and we have two children, a daughter, Avery (6) and a son, Landon (4). In the presentation, I will outline exactly what the Financial Advisor opportunity is, who Edward Jones is as a firm, and why there is such opportunity in today's environment. My hope is that by sharing this information, we may be able to recognize women in our professional and personal lives who would appreciate knowledge of the opportunity.

5:30 Networking

6:00 Speaker

7:00 Dinner/Meeting

RSVP: through the evite or to
jduffy@iastate.edu

If you have questions, email
programs@afwa.org.



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AGENDA

Agenda – March 19, 2014

1. Call to Order
2. Quorum
3. Approval of Minutes
 - a. February
4. Treasurer's Report
5. Committee Reports
 - a. Membership
 - b. Program
 - c. Bulletin
 - d. Scholarship
6. Old Business
 - a. Voting on proposed chapter bylaws and standing rules
 - b. Nominations from the 2014-2015 Nominating Committee (see below)
 - Elections will take place during our April business meeting
7. New Business
 - a. Chapter Insurance? - Margaret
8. Announcements
9. Adjournment

PRESIDENT'S MESSAGE

March 2014

"Many hands make light work." Growing up, that is a phrase I often heard from my grandma, and I can't believe how many times it pops into my head these days. It is a good reminder to delegate when we need help. It is a good

reminder to offer our labor and help when others are in need. In the spirit of this month's duties of nominating new AFWA officers for next year, it is a good reminder to think about pitching in some of your time to help maintain the success of this wonderful chapter!

Kayla Sander

2014-2015 Proposed Slate of Officers

The nominating committee, comprised of Karen Jacobson, Jaimie Williamson and Sama Mitra, announce the slate for 2014-2015:

- President: Theresa Samson
 Email: president@amesafwa.org
- Vice President: Lisa Palmersheim
 Email: vice-president@amesafwa.org
- Secretary: Jaimie Williamson
 Email: secretary@amesafwa.org
- Treasurer: Ann Kurtenbach
 Email: treasurer@amesafwa.org
- Past President: Kayla Sander
 Email: past-president@amesafwa.org
- Program: Cindy Sippel
 Karen Jacobson
 Jan Duffy
 Email: programs@amesafwa.org



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Membership:

Margaret Munson

Elizabeth Bruns

Email: membership@amesafwa.org

Newsletter: Brenda O'Neall-Smith

Email: bulletin@amesafwa.org

Scholarship: Carla Danielson, chair

Barbara Bennett

Ann Kurtenbach

Email: scholarship@amesafwa.org

Webmaster: Margaret Munson

Thanks to Karen and Jaimie for all their efforts. Special thanks to Karen for making the bulk of the phone calls!

MINUTES –February 2014

Accounting and Financial Women's Alliance
Ames Chapter #158
Membership Meeting
February 19, 2014

Call to Order: The February Membership Meeting of the Ames Chapter #158 was called to order by President Kayla Sander in Ames at 6:10 pm on Wednesday, February 19, 2014. Those in attendance were members Soma Mitra, Jan Duffy, Kayla Sander, Marilyn Moehlmann, Margaret Munson, Lisa Palmersheim, Barb Bennett, Jamie Williamson, Kate Mulder, Libby Bruns, Karen Jacobson, Shoba

Premkumar, Katherine Farlow, Liz Humble and Cindy Sippel. A quorum was present.

Minutes:

Jamie Williamson moved and Margaret Munson seconded a motion to approve the November minutes. The motion passed.

Treasurer's Report: Treasurer's Reports for November, December and January were distributed. The general account has a balance of \$7,827.09 and the scholarship account has a balance of \$4,420.61. Letters have been sent to the membership detailing their contributions to the scholarship for 2013. Members are also reminded to see if their companies have matching gift programs. The reports will be placed on file for review.

Committee Reports

A. Membership:

- a. Welcome to new member, Shoba Premkumar
- b. On the national website, there is a member listed from Austin, Texas. We will be following up to see if she is in the correct chapter.

B. Program: The program on making a business plan has been moved to April. The March program will be a financial planner. The May program will be a presentation by Kate and Karen on their trip to South Africa.

C. Bulletin: No report.

D. Scholarship: The scholarship committee received four applications. Two applicants were recommended by the committee to receive scholarships, Elizabeth Bruns a \$2,000 scholarship and Adela Hodzic, a \$1,000 scholarship. Jan Duffy moved and Theresa Samson seconded a motion to



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approve the committee's recommendation. The motion passed. The chapter can submit one graduate and one undergrad scholarship application to National. For next year, the application will be updated to include finance majors.

Old Business

- A. Bylaws – Karen and Margaret have updated the bylaws and sent them to the membership for review. The updated bylaws will be sent to the National president-elect for approval. The membership will vote on the updated bylaws at next month's meeting, if approved by the National president-elect.
- B. Standing Rules – Karen and Margaret also reviewed the standing rules. Proposed changes have been made including some adding some items that the Chapter should or could be doing. The membership has been asked to review the proposed changes and provide comments before the March meeting. The standing rules do not need to be approved by National and can be changed at any time. If possible, we would like to vote to approve the changes at the March meeting.

New Business:

- A. 2014-2015 Nominating Committee – The Nominating Committee will be composed of Soma Mitra, chair, Jamie Williamson and Karen Jacobson. The slate will be presented at the next meeting.
- B. Chapter Dues – Current chapter dues are \$20.50. Jan Duffy moved and Karen Jacobson seconded a motion that chapter dues should remain unchanged for the next year. The motion passed.

- C. National Management Company Change – Kate Mulder, Ames chapter member and current National President, discussed the change in management company that will be happening at National on March 1. The new management company will be Associations International (AI) and is expected to offer our organization more office support. The goal is to make the change as seamless as possible. The National Board is very enthusiastic about the change. Members should go to their chapter leaders or regional directors if they have issues. The Board is working with a transition team.

Announcements: The 2nd Quarterly Chapter Reporting Survey has been submitted to National.

Adjournment: Meeting adjourned at 7:00 pm.

Respectfully submitted,
Cindy Sippel, Secretary

MEMBERSHIP REPORT

Welcome to **Shoba Premkumar!** Shoba has been teaching Corporate Finance courses at Iowa State University since 2003. She holds a BS degree in Accounting from University of Madras, India and an MBA from Iowa State University. Prior to joining ISU, she worked as a management accountant for General Electric Company for the branch in Chennai, India for three years. Shoba has been actively involved in promoting financial literacy among students and community and organized free financial literacy seminars for the benefit of ISU students, staff, and community during 2009. She also



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coordinates Honors Seminar Classes on Money Management as well as Entrepreneurship. For both the courses, Finance professionals and successful Entrepreneurs are featured as guest speakers. Her volunteer activities include serving as adviser for Finance Club as well as Micro-Finance club. Shoba has received Business Council teacher of the month awards, non-eligible Faculty Superior Service award and recognized as outstanding faculty by Interfraternity Council and Collegiate Panhellenic Council during 2007.

JOB OPENING

Adecco Finance & Accounting has a few openings for Accountants, including recent graduates, in the Waterloo area. Please contact:

Lori Ward
 Adecco Finance & Accounting
 1701 48th St., #200
 W. Des Moines, IA 50266
 515.318.6015
Lori.ward@adeccona.com

PROGRAM SCHEDULE

Apr 16th Making a Business Plan
 May 21st AFWA People to People Trip to South Africa
 June 18th TBD

NETWORKING LUNCH SCHEDULE

@ 12:00 Noon

Wed, Mar 26th El Azteca
 2727 Stange Rd., Ames
 Wed, Apr 23rd Brick Street Grill
 2704 Stange Rd., Ames
 Thurs, May 15th Stomping Grounds
 303 Welch Ave., Ames

AMES CHAPTER OFFICERS

President: Kayla Sander
 Email: president@amesafwa.org

Vice President: Theresa Samson
 Email: vice-president@amesafwa.org

Secretary: Cindy Sippel
 Email: secretary@amesafwa.org

Treasurer: Karen Jacobson
 Email: treasurer@amesafwa.org

Past President: Soma Mitra
 Email: past-president@amesafwa.org

Program: Marilyn Moehlmann
 Jan Duffy
 Email: programs@amesafwa.org



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Linda Borst
Email: membership@amesafwa.org

Newsletter: Brenda O'Neall-Smith
Email: bulletin@amesafwa.org

Scholarship: Carla Danielson
Karen Jacobson
Jaimie Williamson
Email: scholarship@amesafwa.org

Webmaster: Margaret Munson
Email: webmaster@amesafwa.org

QUOTE OF THE MONTH

"Strive not to be a success, but rather to be of value."

~ **Albert Einstein**

Articles and submissions to the newsletter are welcome. Please contact bulletin@amesafwa.org