



Volume 9, Number 9

April 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

Preparing a Business Plan

Mike Upah

Wednesday, April 16th

Lucullans

400 Main St., Ames

About our Presenter: Mike Upah

Mike Upah serves as CFO at iSEEK Corporation, an Ames software company that provides engineering software to companies such as John Deere, Kohler and Peterbilt. In that role he directs fundraising and accounting operations, and is also involved in business development projects.

iSEEK Corporation was a startup company that Upah assisted when he was directing the business development activities of the Iowa State University Pappajohn Center for Entrepreneurship, a program closely affiliated with the Iowa State University Research Park. In that role, Upah worked with dozens of

startup technologies companies and hundreds of community businesses in broad areas ranging from information technology to human drug development and provided guidance to companies in the areas of market assessment, intellectual property, licensing, business plan development, private equity fundraising, and business operations.

Previous to joining the Pappajohn Center Mike was involved in two separate entrepreneurial activities. Mike was a founding partner of RCI Environmental Consulting Services in Dallas, Texas, and thereafter he joined Kreg Tool Company of Huxley, Iowa, where he served as Director of Marketing, Product Development and Controller. Mike is an alum of Iowa State University and currently serves on the boards of iSEEK Corporation, Harrisvaccines, FloMetrix, Innovative Energy Solutions, the Huxley Development Corporation and the Ballard Foundation Committee.

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 – April 16, 2014

1. Call to Order
2. Quorum
3. Approval of Minutes
 - a. March
4. Treasurer’s Report
5. Committee Reports
 - a. Membership
 - b. Program
 - c. Bulletin
 - d. Scholarship
6. Old Business
 - a. Elections for the 2014-2015 officer slate
 - b. Chapter Insurance? - Barbara
7. New Business
 - a. Ask for volunteers for the “Member of the Year” selection committee
 - b. Ask for nominations for the “Member of the Year” recipient
8. Announcements
9. Adjournment

PRESIDENT’S MESSAGE

April 2014

Taxes are done....check! The school year is getting wrapped up....check! First quarter is done....check! The weather is above freezing....check!

As we are all getting through a very busy time of the year, we need to take some time to sit back and **enjoy our accomplishments!** However, with the weather starting to feel awfully nice, there is no time to sit inside. It is a perfect time to get outside and get active again! I hope you can all find some relaxation and mental therapy through whatever it is you like to do in the beautiful weather. The options are endless....golf, gardening, biking, reading on the deck, grilling....Enjoy!

Kayla Sander

MEMBER OF THE YEAR

It’s that time of year again! Each year we select a member of our chapter who we feel is deserving of the “AFWA *Member of the Year*” award. Please submit your nominations for “AFWA *Member of the Year*” to the committee via Theresa Samson (Theresa.samson@centurylink.net) by Tuesday, May 20th. We will be announcing this year’s award winner at the June meeting.

2014-2015 Proposed Slate of Officers

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

President: Theresa Samson
 Email: president@amesafwa.org

Vice President: Lisa Palmersheim
 Email: vice-president@amesafwa.org



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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

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 –March 2014

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

Call to Order: The February Membership Meeting of the Ames Chapter #158 was called to order by Vice President Theresa Samson in Ames at 7:00 pm on Wednesday, March 19, 2014. Those in attendance were members Jan Duffy, Brenda O'Neall-Smith, Marilyn Moehlmann, Margaret Munson, Lisa Palmersheim, Barb Bennett, Jamie Williamson, Libby Bruns, Annmarie Kurtenbach, Theresa Samson, Karen Jacobson, and Cindy Sippel. A quorum was present.

Minutes:
One correction to the February minutes was noted, to add Theresa Samson to those in attendance. Jamie Williamson moved and Karen Jacobson seconded a motion to approve the February minutes as amended. The motion passed.

Treasurer's Report: Treasurer's Report for February was distributed. The general account has a balance of \$7,825.41 and the scholarship account has a balance of \$4,421.07. Scholarships in the amount of \$3,000 are payable. The report will be placed on file for review.

Committee Reports

- A. Membership:
- a. Lisa Palmersheim noted that we have a new member, Shoba Premkumar



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- b. It was noted that the member listed from Austin, Texas is no longer on the website but is still on the membership spreadsheet. Once the transition to the new management company is complete, we will see if this is corrected.
 - c. Lisa is planning to compile the results of the membership survey and present the results at the April meeting.
- B. Program: The April program will be on making a business plan. The May program will be a presentation by Kate and Karen on their trip to South Africa. We are still looking for a June program.
- C. Bulletin: Members are encouraged to meet the deadlines for the bulletin.
- D. Scholarship: Payments for the scholarship will be as follows: Elizabeth Bruns - \$1,000 in the summer semester and \$1,000 in the fall. Adela Hodzic - \$500 in the fall and \$500 in the spring semester. Both scholarship recipients are planning to attend the April meeting.

Old Business

- A. Bylaws – The changes to the bylaws have been approved by National. Brenda O’Neill-Smith moved that we accept the changes to the bylaws. Jan Duffy seconded the motion. The motion passed. The bylaws will be posted on the Chapter’s website.
- B. Standing Rules – Several changes to the standing rules were discussed including making the July meeting a formal meeting with minutes. This will be considered our annual meeting. Rather than committee responsibilities, the standing rules will include committee guidelines. In addition,

some of the National duties for committees were consolidated. The standing rules have been adapted to how the chapter currently functions. Cindy Sippel moved and Marilyn Moehlmann seconded a motion that the standing rules be approved as changed at tonight’s meeting. The motion passed.

- C. Nominations for the 2014-2015 slate of officers – The Nominating committee presented the proposed slate of officers for the 2014-2015 year. Elections will take place during our April business meeting. The committee thanks everyone who has agreed to serve.

New Business:

- A. Chapter Insurance – Barbara Bennett will look into whether the chapter might need Director’s and Officer’s Insurance.

Announcements:

- Marilyn Moehlmann is retiring from her job at New Link Genetics.
- Cindy Sippel has retired from the Principal Financial Group and has taken a new position with Global Atlantic Financial group.

Adjournment: Meeting adjourned at 7:54 pm.

Respectfully submitted,
Cindy Sippel, Secretary



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PROGRAM SCHEDULE

May 21st AFWA People to People Trip to South Africa

June 18th TBD

NETWORKING LUNCH SCHEDULE

@ 12:00 Noon

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

Membership: Lisa Palmersheim
Linda Borst
Email: membership@amesafwa.org

Newsletter: Brenda O'Neill-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

"The most difficult thing is the decision to act, the rest is merely tenacity."
~ Amerlia Earhart

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