



## Accounting & Financial Women's Alliance

CONNECT • ADVANCE • LEAD

Ames Chapter

September 2014

# THE SPOKESWOMAN

Websites

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

Local: <http://amesafwa.org>

Ames Chapter #158

### 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

#### Teamwork Counts

Abhijit Rao, PhD

Wednesday, September 17<sup>th</sup>

Iowa Stater at the Gateway

2100 Green Hills Dr., Ames

Nothing beats the sense of accomplishment of a team project done well! Successful teams not only exemplify a high level of coordinated skills but also underline our human need to work within Social contexts. The elusive Question for most remains what traits make some teams to click and some to topple? This discussion workshop will cover team building strategies, group dynamics, and tips for conflict management.

**About our presenter:** Abhijit Rao is the Director of the ISU College of Business & Comm Center. His work includes interacting with students and faculty in

the business college to develop a stronger communication curriculum in the college. He received his PhD in professional communication from Iowa State, where he gained experience in developing strategies for teaching business communication, both inside and outside the classroom. He enjoys interacting with new technology and exploring their implications to workplace communication.

RSVP: through the evite or to [jduffy@iastate.edu](mailto:jduffy@iastate.edu)

### PRESIDENT'S MESSAGE

#### September 2014

I hope you are all enjoying this beautiful fall-like weather. Although I'm sure we will have some more hot days, it feels like summer is behind us.

With our year in full-swing I am looking forward to all the professional development opportunities coming our way. We are fortunate to have a program committee that is so well connected to professionals in our area. With a membership that is so diverse, it takes a lot of effort to secure professional development that is relevant and interesting to us all. I find that even if the program does not relate directly to



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my current position, it is always interesting. I feel like even if it doesn't directly relate to my current position, it could relate to a future position!

I am also reflecting a bit on why this organization is so important to me. The support and encouragement I have experienced from the membership has been extraordinary. Knowing there is a group of women you can trust and call on at any time for help and advice is priceless. This knowledge is so important at all stages of your career.

I think the strength of our organization comes from our diversity. We have members in all stages of their careers in many different areas of accounting and finance. Networking and the sharing of knowledge across those lines is so valuable. You just never know when you may need an expert in one area or another!

Friendship is probably the most valuable benefits of this group and scheduled monthly meetings are a great excuse to get together. Working on projects brings us all closer. When the opportunity presents itself, I would encourage you all to get involved in a special project. It usually ends up being a lot more fun than work!

Hope to see you all on the 17<sup>th</sup>!

Theresa Samson

### PROPOSED BYLAW

### AMENDMENTS

### for 2014 ANNUAL MEETING

Please read the attached proposed amendments and come to the meeting prepared to discuss the proposed changes to the by-laws.

### Thank You

We received the following thank you from Linda in response to our card of condolences.

*Dear Friends at AfFWA - Ames,  
Thank you so very much for your thoughtful card - your kindness in thinking of us and sending this overwhelmed me. I feel truly blessed to be a part of the group and knowing or getting to know you all.*

*Many thanks, Linda Borst*

### AGENDA

#### Agenda - September 17, 2014

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



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6. Old Business
  - a. Chapter Director and Office Insurance
7. New Business
  - a. Bylaw Amendments for 2014 National meeting
8. Announcements
9. Adjournment

### MINUTES – July 2014 Amended

Accounting and Financial Women's Alliance  
Ames Chapter #158  
Membership Meeting  
July 16, 2014

#### Call to Order:

The July Membership Meeting of the Ames Chapter #158 was called to order by President Theresa Samson at 7:25 p.m. on Wednesday, July 16, 2014. Those in attendance were members Elizabeth Bruns, Jan Duffy, Adela Hodzic, Karen Jacobson, Marilyn Moehlmann, Catherine Mulder, Margaret Munson, Lisa Palmersheim, Theresa Samson, Cindy Sippel, and Jaimie Williamson. A quorum was present.

One guest, Sara Kolbe, was also present.

#### Minutes:

Karen Jacobson moved that the minutes of the June meeting be approved. The motion was seconded by Cindy Sippel. Motion carried.

It was also discussed that when minutes are amended, the amended minutes should be sent by the Secretary to the Newsletter committee to be put in the next bulletin. These amended minutes will also reflect that they are amended in the title.

#### Treasurer's Report:

Karen Jacobson handed out the treasurer's report. The balance in the General Account is

\$7,766.88. The balance in the Scholarship Account is \$3,448.03. Scholarship funds in the amount of \$2,000 still need disbursed. Signatures on the bank accounts will be changing due to the change in officers. We are still waiting to receive money related to the survey sent by Bill Dilla and an employer matching contribution from Brenda O'Neil's company.

#### Committee Reports:

- A. Membership: In the 2013-2014 year we had 5 new members and lost 3 members, resulting in a net gain of 2 members.
- B. Program: In the 2013-2014 year we had 7 meetings with CPE credit.
- C. Bulletin: No Report
- D. Scholarship: In the 2013-2014 year two scholarship recipients were selected, with the total amount of scholarships awarded was \$3,000. One of our scholarship recipients, Elizabeth Bruns, was also selected as a recipient of the national scholarship. Fundraising ideas for the scholarship committee were suggested including the possibility of working a concert or a Cyclone event.

#### Old Business:

- A. Chapter Director and Officer Insurance: No report.

#### New Business:

- A. Officer Turnover Material: All 2013-2014 officers should turnover their reports and committee materials to the new officers. Theresa also mentioned that new officers may want to check out the AFWA Chapter Procedures Manual.
- B. Chapter Goals:
  - 8 meetings with CPE credit, we will be meeting in August again this year with no meeting in January. Meetings will also



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- continue to be scheduled for the 3<sup>rd</sup> Wednesday of the month
  - Net membership gain of 0. Long term goal is to maintain our medium sized organization status of 30 members or more
  - Average attendance of 50% of members
- C. Program Ideas:
- The following programs were suggested: new revenue recognition standards, FBI agent, identity theft/cyber security, communication (oral, written, and/or business), team building, Social Security, financial planner, public pension programs, and a discussion on the confidence article Jan e-mailed earlier this year.
  - It was discussed that we could hold a 4 hr CPE event on the new revenue recognition standards as a scholarship fundraiser. This event could be held in conjunction with the Des Moines Chapter or possibly a Big 4 firm. It was discussed that this event could possibly take place on our scheduled meeting date of May 20, 2015.
  - Catherine also suggested holding a meeting(s) at the new Hertz Farm Management Building.
  - Karen will call the Iowa Accountancy Examining Board to make sure we are following the proper protocol regarding CPE.

Adjournment: Meeting adjourned at 9 p.m.

Respectfully submitted,  
Jaimie Williamson, Secretary

### MINUTES – August 2014

Accounting and Financial Women's Alliance  
Ames Chapter #158  
Membership Meeting  
August 20, 2014

#### Call to Order:

The August Membership Meeting of the Ames Chapter #158 was called to order by President Theresa Samson at 7:30 p.m. on Wednesday, August 20, 2014. Those in attendance were members: Barbara Bennett, Elizabeth Bruns, Cheryl Carlile, Jan Duffy, Adela Hodzic, Karen Jacobson, Annmarie Kurtenbach, Julie Luther, Marilyn Moehlmann, Margaret Munson, Theresa Samson, Kayla Sander, Cindy Sippel, Jaimie Williamson and our newest member Sara Kolbe.

One guest, Kylie King, was also present.

#### Minutes:

Jan Duffy moved that the minutes of the July meeting be approved as corrected. The motion was seconded by Marilyn Moehlmann. Motion carried. Corrected minutes will be included in the next Bulletin.

#### Treasurer's Report:

Ann Kurtenbach presented the treasurer's report for July along with the proposed budget for 2014-2015. The chapter discussed the proposed budget for the year. Jane moved to add an allocation of \$100 for internet expense and approve the budget, Cindy seconded. Motion carried. Although the budget included a donation to The Foundation of AFWA for \$500, members requested a separate motion to approve the disbursement. Karen moved the payment of \$500 to The Foundation of AFWA, Libby seconded.



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After much discussion, Karen moved to amend the motion to reduce the \$500 donation to \$300, Libby seconded, motion carried. With the reduced donation of \$300, the budget was accordingly reduced as well.

#### Committee Reports:

- E. Membership: As of August 19<sup>th</sup>, we had 34 members. This figure did not count our newest member Sara Kolbe. Libby reported that she watched the AFWA webinar on membership and shared ideas to possibly implement to our chapter members. Margaret received an e-mail from Masters' in Accounting asking for the best advice we could offer to someone for getting hired in the field of accounting. The chapter recommended Margaret send this e-mail to National to respond .
- F. Program: Our September meeting will be a team building meeting. In October, we will be having a joint meeting with the AFWA Des Moines chapter. This meeting will be a tax topic and will be held on the Des Moines Chapter's regular Tuesday night. Topics for the remainder of the year were discussed. The Program Committee will provide Margaret with the complete schedule as soon as possible for inclusion on the website.
- G. Bulletin: No Report
- H. Scholarship: The remaining \$2,000 in scholarship funds were disbursed in August. Jan recommended the scholarship committee look into upcoming events at Hilton (ISU) that our chapter could possibly work at to help raise money for our scholarship fund. Kayla passed on the contact information for a Hilton employee that we should contact to arrange this to Ann.

#### Old Business:

- B. Chapter Director and Officer Insurance: Barb reported that we should have coverage because our organization can still be sued, even though unpaid directors are covered under Iowa statute. Karen will talk to Ericka at National to see if they have any coverage we can participate with before we pursue anything.
- C. Officer Turnover Material: If you are a former officer and have yet to turnover your reports and committee materials to the new officers, please do so.

#### New Business:

- D. 2014 AFWA Annual Conference: Karen Jacobson and Sara Kolbe will be attending the AFWA Annual Conference. Karen moved for Sara to serve as a regular delegate carrying 2 votes, Karen to serve as a regular delegate carrying 1 vote, Sara to serve as an alternate delegate carrying 1 vote, and Karen to serve as an alternate delegate carrying 2 votes. Jan seconded, motion carried.
- E. Opportunity from National: National has an opportunity to serve on a subcommittee for supporting the chapters holding the Spring Regional Conferences. This subcommittee would meet once monthly via phone conference call. The goal of this subcommittee is to promote one to two conferences per spring. Please contact Teresa if you are interested in serving.

Adjournment: Meeting adjourned at 8:23 p.m.

Respectfully submitted,

Jaimie Williamson, Secretary



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## NETWORKING LUNCH SCHEDULE

@ 12:00 Noon

Tues, Sept 30 <sup>th</sup>	Applebee's 105 Chestnut St.,
Wed, Oct 29 <sup>th</sup>	Fuji Japanese Steakhouse 1614 S. Kellogg
Wed, Nov 12 <sup>th</sup>	The Café 2616 Northridge Pkwy
Fri, Jan 23 <sup>rd</sup>	El Azteca 2727 Stange Rd.
Mon, Feb 9 <sup>th</sup>	Aunt Maude's 547 Main St.
Thurs, Mar 26 <sup>th</sup>	Wallaby's 2733 Stange Rd
Tues, Apr 28 <sup>th</sup>	Panera Bread 309 S. Duff
Thurs, May 14 <sup>th</sup>	Stomping Grounds 303 Welch Ave
Mon, Jun 8 <sup>th</sup>	Brick City Grill 2704 Stange Rd.

Please RSVP through the Evite or to [membership@amesafwa.org](mailto:membership@amesafwa.org) by noon the day before.

## AMES CHAPTER OFFICERS

President:	Theresa Samson Email: <a href="mailto:president@amesafwa.org">president@amesafwa.org</a>
Vice President:	Lisa Palmersheim Email: <a href="mailto:vice-president@amesafwa.org">vice-president@amesafwa.org</a>
Secretary:	Jaimie Williamson Email: <a href="mailto:secretary@amesafwa.org">secretary@amesafwa.org</a>

Treasurer:	Ann Kurtenbach Email: <a href="mailto:treasurer@amesafwa.org">treasurer@amesafwa.org</a>
Past President:	Kayla Sander Email: <a href="mailto:past-president@amesafwa.org">past-president@amesafwa.org</a>
Program:	Cindy Sippel Karen Jacobson Jan Duffy Email: <a href="mailto:programs@amesafwa.org">programs@amesafwa.org</a>
Membership:	Margaret Munson Elizabeth Bruns Email: <a href="mailto:membership@amesafwa.org">membership@amesafwa.org</a>
Newsletter:	Brenda O'Neall-Smith Email: <a href="mailto:bulletin@amesafwa.org">bulletin@amesafwa.org</a>
Scholarship:	Carla Danielson, chair Barbara Bennett Ann Kurtenbach Email: <a href="mailto:scholarship@amesafwa.org">scholarship@amesafwa.org</a>
Webmaster:	Margaret Munson Email: <a href="mailto:webmaster@amesafwa.org">webmaster@amesafwa.org</a>

## QUOTE OF THE MONTH

"Remember teamwork begins by building trust. And the only way to do that is to overcome our need for invulnerability."

~ **Patrick Lencioni** – Author of *The Five Dysfunctions of a Team: A Leadership Fable*



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**FREE CPE for Tax Preparers**

## COMBATING IDENTIFY THEFT WEBINAR

### Combating Identity Theft Part I

Date: Sep 17, 2014  
Time: 10:00 AM - 11:00 AM (Central Time)

#### Part I includes

- How to identify an ID theft victim
- What is an identity theft PIN (IP PIN) and how does it work
- Tax preparer due diligence

Hosted By: Stakeholder Liaison Midwest (IRS Stakeholder Liaison)  
Presented By: Carole Smith and Karen Brehmer (Midwest Area Stakeholder Liaisons)

**To register for this event, use the following**

**link:** <https://events.na.collabserv.com/register.php?id=88cce6cf14&l=en-US>

If clicking the above link does not work, please copy the entire link and paste it into your Web browser.

### Combating Identity Theft Part II

Date: Sep 24, 2014  
Time: 10:00 AM - 11:00 AM (Central Time)

#### Part II includes

- Online ID theft
- Phishing schemes
- Criminal Investigation's role in ID theft

Hosted By: Stakeholder Liaison Midwest (IRS Stakeholder Liaison)  
Presented By: Carole Smith and Karen Brehmer (Midwest Area Stakeholder Liaisons)

**To register for this event, use the following link:**

<https://events.na.collabserv.com/register.php?id=ad594dd43b&l=en-US>

If clicking the above link does not work, please copy the entire link and paste it into your Web browser.

You have to sign up for each webinar separately. Also, **before** you begin to register be sure your spam filter is set to accept email from the webinar provider - confirmation and reminder emails will appear with the name "SBSE SL Midwest" and will be from either of these two email addresses: [no-reply@collabserv.com](mailto:no-reply@collabserv.com) and [noreply@infiniteconferences.com](mailto:noreply@infiniteconferences.com). (It will not work if you change your filter after you register.) You will get a series of three emails in order to complete the registration process.

One continuing education credit will be offered by the Internal Revenue Service. PTIN required to receive continuing education credit.

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