



October 2014

## THE SPOKESWOMAN Websites

Ames Chapter #158

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

#### JOINT MEETING WITH THE DES MOINES CHAPTER, TUESDAY, OCTOBER 21ST

Please join us for the October AFWA meeting. This CPE meeting is also our annual networking event with the Des Moines chapter, who is hosting the meeting. We hope you'll be able to join us.

#### 2014 Tax Highlights and Reminders

Tuesday, October 21<sup>st</sup>

#### Tasteful Dinners

121 SE Shurfine Drive, Su 6, Ankeny  
Cost is \$15 members, \$20 non-members,  
\$10 first time guests

**Presenters:** Robert Woollums, CPA, CMGA, and Lynn Woollums, CPA

**Title:** Owners of Woollums CPA, P.C., Johnston, IA

**Learning Objectives & Program Content:**

This program will provide an update on 2014 tax highlights and reminders in the areas of

Managing Income, Planning Ideas, Tax Credits, Estate Planning, and Record Keeping.

**Program Level:** Basic

**Program Prerequisites/Advance**

**Preparation:** None

**Field of Study:** Taxes

**Instructional Delivery Method:** Group Live

**Recommended Amount of CPE Credit:** 1 credit hour

**Program Date:** Tuesday, October 21, 2014

**Administrative Policies:** If you would like to make or cancel a reservation, please send an email to [sweaver@iowarealty.com](mailto:sweaver@iowarealty.com).

Per chapter rules, if you register and do not attend, you will be charged the cost of the dinner. For more information regarding administrative policies such as complaint and refund, please contact Des Moines #153

President Amie Bobst at [BobstAG@pella.com](mailto:BobstAG@pella.com)

**Official National Registry Statement**

AFWA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of accountancy have the final authority on the acceptance of individual courses of CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors: 150 Fourth Avenue, Suite 700, Nashville, TN, 37219-2417. Web site: [www.nasba.org](http://www.nasba.org)

The schedule for the evening will be:

5:30 p.m. Dinner/Social Time (including special presentations from National)

6:00 p.m. Speaker

7:00 p.m. Meeting concludes

Meeting will be held Tuesday, October 21st at Tasteful Dinners, 121 SE Shurfine Drive, Suite 6 in Ankeny. Cost is \$15 members, \$20 non-members, \$10 first time guests. Payment in the form of cash or check will be due at the event.



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Please RSVP by **12:00 p.m. on Monday, October 20th** through the Des Moines Chapter website ([www.desmoinesafwa.org/meetings](http://www.desmoinesafwa.org/meetings)) if you will be attending the meeting. No separate evite will be sent. If you must change your registration, please contact [Shelly Weaver](mailto:Shelly>Weaver@lowarealty.com) at [sweaver@lowarealty.com](mailto:sweaver@lowarealty.com). All reservations must be honored and paid for.

**We look forward to seeing you there!**

**DON'T MISS THE MEETING!!**  
*We all know how awesome Kayla Sander is. Come to the October meeting to find out how the National organization feels about her.*

**PRESIDENT'S MESSAGE**

**October 2014**

October is joint meeting month and this year it is the Des Moines Chapter's turn to host. There will be no business meeting, just an evening to network, enjoy an interesting program and a good meal. It is a great opportunity to connect with old friends and maybe make some new ones!

I hope to see you all there!  
 Theresa Samson

**Thank You**

*Dear AFWA Friends,  
 Thank you so much for your kind words and expression of sympathy. It is never easy - Mom always told me, "You never quit missing your mother" and I know that is true. The support and thoughtfulness of friends helps, and I very much appreciate it. Cyndie*

**AGENDA**

No Business Meeting this month

**2014 AFWA ANNUAL CONFERENCE AND  
 BUSINESS MEETING**

The AFWA annual conference in New Orleans was packed with great topics, presenters and fun! As a first time attendee I was pleasantly surprised by how everyone was so welcoming. From the first time attendee meeting where they gave us a few simple dos and don'ts, to the final awards luncheon it was a whirlwind of activity. As I met other wonderful members from around the country one thing was clear that this one big family in which everyone pitches in and helps everyone they can in any way possible. The foundation Royal stroll was a fun starting event to get to know others and see a bit of New Orleans in the process. The topics covered were great and hit most areas of the industry and personal enrichment for ourselves. The presenters did amazingly well presenting the



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topics even those that weren't very exciting like tax updates. The business meeting itself was interesting to witness how a properly conducted meeting goes. Meetings have become so informal now it was a fun reminder of days gone by. I was also impressed by the accolades received by the Ames chapter and its members. I could go on and on about everything that happened, but to keep this brief, Kate, Karen and I will tell you all about it at the October meeting in Des Moines! You won't want to miss out on all the great information and find out what makes Ames the best chapter to belong!

See you there!

Sara Kolbe

### MINUTES –September 2014

Accounting and Financial Women's Alliance  
Ames Chapter #158  
Membership Meeting  
September 17, 2014

#### Call to Order:

The September Membership Meeting of the Ames Chapter #158 was called to order by President Theresa Samson at 7:38 p.m. on Wednesday, September 17, 2014. Those in attendance were members: Barbara Bennett, Jan Duffy, Karen Jacobson, Annmarie Kurtenbach, Marilyn Moehlmann, Margaret Munson, Lisa Palmersheim, Theresa Samson, Cindy Sippel, Jaimie Williamson, and Sara Kolbe.

A quorum was present.

#### Minutes:

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

#### Treasurer's Report:

Ann Kurtenbach handed out the treasurer's report. The balance in the General Account is \$8,693.32. The balance in the Scholarship Account is \$1,148.94. A Scholarship Account has been opened. A \$75 deposit from Bob Dilla for our participation in the survey is being held, along with a \$385 deposit from AFWA Ames Chapter members for their donations to the Scholarship Account. These deposits were not reflected in the treasurer's report. The report will be placed on file for review.

Ann reported that our checking account was linked to National's EIN which has now been corrected and changed to reflect our chapter's EIN. She also reported that National files our 990's.

#### Committee Reports:

- A. Membership: We currently have 33 members. It was noted that the member listed from Austin, Texas is still appearing on the membership spreadsheet, although she is not a member of our chapter.
- B. Program: Our October meeting is a joint member CPE meeting with the Des Moines Chapter. This meeting will be held on Tuesday, October 21<sup>st</sup> from 5:15-7 p.m. at Tasteful Dinners in Ankeny. Rob and Lynn Woollums from Woollums CPA Firm will be presenting on a tax topic. Our November meeting will be held on Tuesday, November 18<sup>th</sup> with a topic presented by the new IRS liaison. The Program Committee will provide Margaret with the complete schedule as soon as possible for inclusion on the website.
- C. Bulletin: No Report
- D. Scholarship: Ann has not made contact with the Hilton employee regarding working concession events.



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Old Business:

- A. Chapter Director and Officer Insurance: Karen reported that she spoke with Ericka at National and found out that they do have Director and Officer insurance, along with liability insurance, however they do not have a chapter link program for us to obtain coverage. National does plan on looking into this. Barbara suggested that we need to evaluate our risks to determine if we want to obtain liability insurance and also pointed out that we will have to price shop if National does come up with an insurance offering.

New Business:

- A. Bylaw Amendments for 2014 National meeting: A motion was made by Margaret Munson and seconded by Cindy Sippel that our delegates be sent informed to the annual meeting. Motion carried.

Announcements: Cynthia Jeffrey's mother passed away a couple of weeks ago. Members are encouraged to send a card. Cynthia's address is: 237 Wildflower Dr Ames, IA 50014. The 2014 AFWA Annual Conference is being held September 28<sup>th</sup>-October 1<sup>st</sup> in New Orleans, LA.

Adjournment: Meeting adjourned at 8:03 p.m.

Respectfully submitted,  
Jaimie Williamson, Secretary

### NETWORKING LUNCH SCHEDULE

@ 12:00 Noon

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: [president@amesafwa.org](mailto:president@amesafwa.org)
- Vice President: Lisa Palmersheim  
Email: [vice-president@amesafwa.org](mailto:vice-president@amesafwa.org)
- Secretary: Jaimie Williamson  
Email: [secretary@amesafwa.org](mailto:secretary@amesafwa.org)
- Treasurer: Ann Kurtenbach  
Email: [treasurer@amesafwa.org](mailto:treasurer@amesafwa.org)



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Past President: Kayla Sander  
Email: [past-president@amesafwa.org](mailto:past-president@amesafwa.org)

Program: Cindy Sippel  
Karen Jacobson  
Jan Duffy  
Email: [programs@amesafwa.org](mailto:programs@amesafwa.org)

Membership:  
Margaret Munson  
Elizabeth Bruns  
Email: [membership@amesafwa.org](mailto:membership@amesafwa.org)

Newsletter: Brenda O'Neall-Smith  
Email: [bulletin@amesafwa.org](mailto:bulletin@amesafwa.org)

Scholarship: Carla Danielson, chair  
Barbara Bennett  
Ann Kurtenbach  
Email: [scholarship@amesafwa.org](mailto:scholarship@amesafwa.org)

Webmaster: Margaret Munson  
Email: [webmaster@amesafwa.org](mailto:webmaster@amesafwa.org)

## QUOTE OF THE MONTH

"True leaders understand that leadership is not about them but about those they serve. It is not about exalting themselves but about lifting others up."  
~ **Sheri L. Dew** – Author and Publisher

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