



April 2015

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

"Understanding Social Security"

Wednesday, March 18th

Buford's Steakhouse Bunkhouse

Quality Inn, 2601 E. 13th St., Ames

Learning Objectives & Program

Content: For those who qualify for benefits, Social Security is a retirement income source with choices and therefore some degree of control. Managing Social Security benefits should be a part of a person's entire retirement income process. As not everyone understands how Social Security benefits work-or how to help maximize those benefits-the presentation should give attendees a good overview of the program, qualifications and benefits-especially how to maximize them.

Speakers:

Ryan L. Brooks Partner & Lead Advisor – Capital Financial Partners

Ryan has worked in the financial services industry since 2005 and currently holds the Series 7, 65 and 63 registrations. He graduated from Iowa State University with a

Bachelor of Science degree. Ryan seeks to build enduring relationships, providing thoughtful solutions to help his clients work to achieve their financial goals. Ryan served on the Board of Directors for the United Church of Christ Iowa Conference and is routinely a guest speaker for various universities. He lives downtown Des Moines and enjoys the high energy environment. He is passionate about college athletics, working out, traveling and spending time with family and friends.

Loren W. Sherman Partner & Financial Services Professional – Capital Financial Partners

Loren, a native Iowan born in Lake Mills, has been in the financial services industry since 2005. He graduated from Central College with a degree in Communication Studies as well as Philosophy and Religion. Loren works with young professionals, business owners and retirees who strive to make sense and feel good about their finances. Loren resides in West Des Moines and is actively involved with both the Independent Order of Odd Fellows as well as the Church of Hope. He also enjoys spending time with his family, traveling, biking, golfing and teaching a weekly exercise class.

Program Level: Intermediate

Program Prerequisites/Advanced Preparation: None

Field of Study: Taxes

Recommended Amount of CPE Credit: 1 credit hour



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Administrative Policies: Please respond to the evite. Meals will be individual bills. If you would like to make or cancel a reservation and did not receive a separate evite, please send an email to Cindy.Sippel@gafg.com. For more information regarding administrative policies such as complaint and refund, please contact Ames Chapter Program Co-Chair, Jan Duffy at programs@amesafwa.org.

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

The schedule for the evening will be:

- 5:15 p.m. Networking
- 6:00 p.m. Speaker
- 7:00 p.m. Dinner and Meeting

Please RSVP by **12:00 p.m. on Monday, April 13th** through the separate evite being sent. If you must change your registration after that time, please contact Jan Duffy at Programs@amesafwa.org or update your response on the Evite.

PRESIDENT'S MESSAGE

April 2014

I hope you all had a chance to relax and enjoy a beautiful Easter Day with family and friends. I have to say it was a nearly perfect day!

We will be voting on new officers this month. We have a full slate of officers and we are so grateful for those of you who are willing and able to serve in these leadership positions. If you were not able to commit to an officer position this year, know that there will be other opportunities to contribute throughout the year and in years to come.

The Springfield, Missouri chapter is hosting a regional conference in June. Check out the information sent with this month's newsletter and consider attending if you can. It is a great opportunity to support a neighbor chapter and receive a ton of CPE. It is also within driving distance and weather should not be a problem!

Looking forward to seeing you all on the 15th!

Theresa Samson



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INVITATION TO ALL AMES

CHAPTER AFWA MEMBERS

Please join Stan and Kathy Strum in celebrating their Golden Wedding Anniversary of 50 years on Saturday, May 16, 2015 from 1:30 pm - 4:30 pm at the Indian Creek Country Club in Nevada, Iowa. Gifts are not necessary; however, if you feel moved to provide a gift, it is suggested a gift in honor of Stan and Kathy Strum to either the Nevada Food Pantry or the Nevada American Legion.

From Karen Jacobson: If you want to carpool, let me know at kjacob107@hotmail.com or 515-460-1496. Also, if you would like to send a card, Kathy and Stan's address is 1007 Waterbuy Circle, Altoona, IA 50009.

AFWA Spring Conference in

Springfield, MO

The Springfield Chapter of AFWA would like to invite you to attend the spring conference to be held on June 10-12th, 2015. Attached is the Schedule of Events and Registration Form.

2015-2016 Proposed Slate of Officers

The nominating committee, comprised of Kayla Sanders, Karen Jacobson and Cindy Sippel, announce the slate for 2015-2016:

- President: Lisa Palmersheim
 Email: president@amesafwa.org
- Vice President: Jaimie Williamson
 Email: vice-president@amesafwa.org
- Secretary: Sara Kolbe
 Email: secretary@amesafwa.org
- Treasurer: Ann Kurtenbach
 Email: treasurer@amesafwa.org
- Past President: Theresa Samson
 Email: past-president@amesafwa.org
- Program: Cindy Sippel
 Libby Bruns
 Julie Luther
 Email: programs@amesafwa.org
- Membership: Karen Jacobson
 Marilyn Moehlmann
 Email: membership@amesafwa.org
- Newsletter: Jodi Baker
 Email: bulletin@amesafwa.org
- Scholarship: Barbara Bennett, Chair
 Ann Kurtenbach, Treas.
 Margaret Munson
 Email: scholarship@amesafwa.org
- Webmaster: Margaret Munson



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AGENDA

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
7. New Business
 - a. Vote on 2015-2016 Slate of Officers
 - b. Chapter Forms Packet
8. Announcements
9. Adjournment

MINUTES – March 2015

Accounting and Financial Women's Alliance
 Ames Chapter #158
 Membership Meeting
 March 18, 2015

Call to Order:

The March Membership Meeting of the Ames Chapter #158 was called to order by President Theresa Samson at 7:37 p.m. on Wednesday, March 18, 2015, at The Iowa Stater Restaurant in Ames, IA. Those in attendance were members: Barbara Bennett, Linda Borst, Elizabeth Bruns, Carla Danielson, Jan Duffy, Karen Jacobson, Annmarie Kurtenbach, Marilyn Moehlmann, Margaret Munson, Lisa Palmersheim, Theresa Samson, Kayla Sander,

Cindy Sippel, Jaimie Williamson, and Sara Kolbe.

A quorum was present.

Agenda:

President Theresa Samson noted that two additional items needed to be added to the agenda under New Business. Those were 25th Anniversary and the AFWA Springfield Conference. Motion made to adopt the revised agenda, motion seconded, motion carried.

Minutes:

The February minutes were available for all to read. Motion made that the February minutes be approved, motion seconded, motion carried.

Treasurer's Report:

Ann Kurtenbach handed out the February 2015 treasurer's report. The balance in the General Account as of 2/28/15 is \$7,971.57. The balance in the Scholarship Account as of 2/28/15 is \$1,952.33. Interest income was reported for both the General Account and Scholarship Account in February. \$13.58 in speaker meal expenses were also paid from the General Account. The report was placed on file for review.

Committee Reports:

A. Membership:

- a.) Elizabeth Bruns reported that we currently have 34 members on our member spreadsheet, including a new member from Houston, TX that is in error.
- b.) Margaret Munson reported that we actually have 31 members, subtracting out lapsed members and the two members from Texas.



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- c.) We have one new member: Marin Felz from Edward Jones in Ames.
- B. Program:
 - a.) Our April meeting will include a program on Social Security.
 - b.) In May, the Story County Assessor will present a program on property taxes, assessment process, and the appeal process. The May meeting will be held at Hertz Farm Management in Nevada and Hickory Park will be catered in.
 - c.) Cindy is working on the June program.
- C. Bulletin: No Report
- D. Scholarship:
 - a.) The scholarship committee received six applications. The scholarship committee recommended Sarah Olson to receive a \$2,000 scholarship. Margaret Munson moved and Marilyn Moehlmann seconded a motion to approve the committee's recommendation. The motion passed.
 - b.) AFWA Chapters can now recommend more than one individual for a graduate and undergraduate scholarship. The scholarship committee recommended to send 3 scholarship applicants to National for scholarship consideration: Sarah Olson (graduate scholarship), Kylee King (undergraduate scholarship), and Katelynn

Pringets (undergraduate scholarship). Margaret Munson moved and Jan Duffy seconded a motion to approve the committee's recommendation. The motion passed.

- c.) Ann Kurtenbach said the scholarship committee will be making recommendations to National to change the financial section of the National scholarship application. These recommendations will be given to Karen Jacobson to present to the National scholarship committee.

Old Business:

- A. None

New Business:

- A. Vote on Changes to Chapter Standing Rules: No discussion, this was voted on at last month's meeting.
- B. Vote on Changes to Chapter Bylaws: Cindy moved to accept proposed changes to our Chapter's Bylaws as presented in the bulletin. Karen seconded, motion carried.
- C. 2015-2016 Slate of Officers: The Nominating committee presented the proposed slate of officers for the 2015-2016 year. The committee thanks everyone who has agreed to serve.
- D. Focus Groups: Focus group was held after the meeting adjourned.
- E. 25th Anniversary Celebration: Karen Jacobson, Jan Duffy, Margaret Munson, and Margaret Moehlmann volunteered to be on a 25th Anniversary Celebration committee.
- F. Springfield Conference: A regional conference will be held from June



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10-12 in Springfield, MO. The registration is \$365 and it is \$99/night for a room. Karen Jacobson is planning to attend and if anyone would like to join her, please let her know. Also, if anyone wants to put together a silent auction gift, Karen will bring it with her.

Announcements: None

Adjournment: Meeting adjourned at 8:18 p.m.

Respectfully submitted,

Jaimie Williamson, Secretary

NETWORKING LUNCH SCHEDULE

@ 12:00 Noon

Tues, Apr 28th Panera Bread
309 S. Duff

Thurs, May 14th Stomping Grounds
303 Welch Ave

Mon, Jun 8th Brick City Grill
2704 Stange Rd.

Please RSVP through the Evite or to membership@amesafwa.org by noon the day before.

AMES CHAPTER OFFICERS

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

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
Email: webmaster@amesafwa.org

QUOTE OF THE MONTH

"The only person you are destined to become is the person you decide to be."
Ralph Waldo Emerson

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