



Accounting & Financial Women's Alliance

CONNECT • ADVANCE • LEAD

Ames Chapter

May 2015

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

"The Duties of the Iowa Assessor & the Assessment and Appeal Process"

Wednesday, May 20th

Hertz Farm Management
415 S. 11th St., Nevada, IA

Presenter: Wayne Schwickerath, CAE-ASA-ICA
Wayne is a Certified Assessment Evaluator (from the International Association of Assessing Officers), an Accredited Senior Appraiser (from the American Society of Appraisers, Real Property, Ad Valorem Discipline) and an Iowa Certified Assessor (from Iowa Certified Assessors). Previous assessor duties included Chickasaw and Polk Counties. He has served as the Secretary-Treasurer of the Iowa State Association of Assessors from 1996 to the present.

Title: Story County (IA) Assessor (since 2004)

Learning Objectives & Program Content: This presentation will discuss and review the duties of the Iowa Assessor concerning the assessment of real estate along with the appeal process. You

will leave with an overall understanding of the laws and rules concerning the assessment of real estate in Iowa for property tax purposes.

Field of Study: Taxes

Program Level: Basic

Program Prerequisites/Advance Preparation:
None

Instructional Delivery Method: Group Live

Recommended Amount of CPE Credit: 1 credit hour

Administrative Policies: If you would like to make or cancel a reservation and did not receive a separate invite, please send an email to kjacob107@hotmail.com or call Karen Jacobson at 515-460-1496.

Since this meal will be catered in, 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 Ames Chapter Program Co-Chair Karen Jacobson at kjacob107@hotmail.com or 515-460-1496.

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



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The schedule for the evening will be:

5:30 p.m. Networking & Dinner

6:15 p.m. Speaker

7:15 p.m. Meeting

Please RSVP by **12:00 p.m. on Monday, May 18th** through the separate evite being sent. If you must change your registration after that time, please contact Karen Jacobson at 515-460-1496, kjacob107@hotmail.com or update your response on the Evite.

The meal is catered from Hickory Park with the cost of the meal \$10.00 per person. Water is free, soda is 50 cents, and you can bring wine if you wish.

AN 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.

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
 - e. 25th Anniversary of Chapter
6. Old Business
7. New Business
8. Announcements
9. Adjournment

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,



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2015. Attached is the Schedule of Events and Registration Form.

MINUTES – April 2015

Accounting and Financial Women's Alliance
Ames Chapter #158
Membership Meeting
April 15, 2015

Call to Order:

The April Membership Meeting of the Ames Chapter #158 was called to order by President Theresa Samson at 7:46 p.m. on Wednesday, April 15, 2015, at Buford's Steakhouse in Ames, Iowa. Those in attendance were members: Barbara Bennett, Elizabeth Bruns, Cheryl Carlile, Jan Duffy, Karen Jacobson, Annmarie Kurtenbach, Marilyn Moehlmann, Catherine Mulder, Margaret Munson, Lisa Palmersheim, Theresa Samson, Cindy Sippel, Jaimie Williamson, and Tamra Shadlow.

A quorum was present.

Agenda:

Karen Jacobson moved to amend the agenda and add "25th Anniversary" as an ongoing committee report. Jan seconded, motion carried.

Minutes:

The March minutes were available for all to read. Motion made by Jan to approve the March minutes with spelling corrections, Cheryl seconded, motion carried.

Treasurer's Report:

Ann Kurtenbach handed out the March 2015 treasurer's report. The balance in the General Account as of 3/31/15 is \$7,983.90. The balance in the Scholarship Account as of 3/31/15 is \$2,152.41. Interest income was reported for both

the General Account and Scholarship Account in March. Two months of meeting room expenses, totaling \$70, were also paid from the General Account. The report was placed on file for review.

Committee Reports:

A. Membership:

- a.) Margaret reported that we currently have 30 members, which excludes the member from Texas that is showing up on our membership report.
- b.) Elizabeth reported that she would like printed flyers to hand out to people. She will print and e-mail them herself.

B. Program:

- a.) 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.
- b.) Cindy is working on the June program.

C. Bulletin: No Report

D. Scholarship: No Report

- ##### E. 25th Anniversary: Jan, Karen, and Ann met at an AFWA networking luncheon and discussed our 25th Anniversary. An idea they came up with was to have a 2 to 4 hour Treasurer's Workshop, in which Ann would prepare the outline of what should be covered. We would need a speaker to present that preferably had experience with non-profits. Jan, Marilyn, Margaret, Karen and Ann will meet next Monday to further discuss what to do. Ideas from members are welcome. They are



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tentatively looking at doing something in the month of October.

Old Business:

- A. None

New Business:

- A. Vote on 2015-2016 Slate of Officers: Cindy moved to approve the 2015-2016 Slate of Officers as presented in the bulletin. Lisa seconded, motion carried.
- B. Chapter Forms Packets: These were handed out to the approved 2015-2016 Slate of Officers to complete.

Announcements:

- A. Margaret reported that she has not heard back from National yet regarding our bylaws.
- B. Cindy sent in the comments from our focus group we had in March.

Adjournment: Meeting adjourned at 8:12 p.m.

Respectfully submitted,

Jaimie Williamson, Secretary

NETWORKING LUNCH SCHEDULE

@ 12:00 Noon

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

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