



Accounting & Financial Women's Alliance

CONNECT • ADVANCE • LEAD

Ames Chapter

November 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

"Iowa's Fiscal Position and Fraud in Governmental Entities"

Wednesday, November 18th

The IowaStater Restaurant
2100 Green Hills Dr, Ames, IA

Presenter: Mary Mosiman, Auditor State of Iowa

Field of Study: Government

Program Level: Basic

Program Prerequisites/Advance Preparation:
None

Instructional Delivery Method: Group Live

Recommended Amount of CPE Credit: 1 credit hour

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, Cindy Sippel at Cindy.Sippel@gafg.com or 515-450-8670.

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:

5:30 p.m. Networking

6:00 p.m. Speaker

7:00 p.m. Meeting

Please RSVP through the separate evite being sent. If you must change your registration after that time, please contact Cindy Sippel at Cindy.Sippel@gafg.com or 515-450-8670 or update your response on the Evite.

NETWORKING LUNCHEON

Wednesday, November 11, 2015

Brick City Grill

Begins at 12:00 P.M.

Please RSVP through the separate evite being sent.

PRESIDENT'S MESSAGE



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The 25th Anniversary celebration was absolutely a wonderful time. Thank you to the committee members for all your hard work planning the event. I personally had a great time getting to know Cheryl and her husband while enjoying the beautiful landscape. Karen and Kate also gave a wonderful program on our AFWA history and the key accomplishments of the group. It was also a very touching tribute to Karen Jacobson, the recipient of the Ames AFWA Founders award. I'm sure there weren't very many dry eyes in the room.

The dinner train was a great opportunity to unwind a little before jumping head first into John Deere's fiscal year end. The end of October and all of last week was a jam packed few days topped off with some last minute process changes. I'd like to say I could now start to relax, but the submission of our Original Budget is still being finalized.

AGENDA

Agenda:

1. Call to Order
2. Quorum (30 members)
3. Approval of Minutes (June & August)
4. Treasurer's Report
5. Committee Reports
 - a. Membership
 - b. Program
 - c. Bulletin
 - d. Scholarship
 - e. 25th Anniversary of Chapter
 - f. Treasurer's Workshop
6. Old Business

- a. Standing Rule Change (Theresa proposal)
7. New Business
 - a. Bylaw Change
8. Announcements
9. Adjournment

MINUTES – June and August 2015

Accounting and Financial Women's Alliance
Ames Chapter #158
Membership Meeting
June 17, 2015

Call to Order:

The June Membership Meeting of the Ames Chapter #158 was called to order by President Theresa Samson at 7:27 p.m. on Wednesday, June 17, 2015, at The IowaStater Restaurant in Ames, Iowa. Those in attendance were members: Jodi Baker, Elizabeth Bruns, Cheryl Carlile, Karen Jacobson, Annmarie Kurtenbach, Marilyn Moehlmann, Catherine Mulder, Lisa Palmersheim, Theresa Samson, Kayla Sander, Cindy Sippel, and Jaimie Williamson.

A quorum was present.

Minutes:

Cindy Sippel moved that the minutes of the May meeting be approved. The motion was seconded by Jodi Baker. Motion carried.

Treasurer's Report:

Ann Kurtenbach handed out the May 2015 treasurer's report. The balance in the General Account as of 5/31/15 is \$7,992.69. The balance in the Scholarship Account as of 5/31/15 is \$2,158.54 with an unrestricted balance of \$158.54.

Committee Reports:

A. Membership:

- a.) Elizabeth reported that we currently have 30 members, not including the 1 member from Texas that is still showing on our roster.

B. Program:

- a.) The July planning meeting will be on Wednesday, July 15th



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and Cindy Sippel has graciously offered to host us, it will be a potluck dinner like last year.

- C. Bulletin: No report
- D. Scholarship: No report
- E. 25th Anniversary: No update regarding the Treasurer's Workshop that will be held on Saturday, October 10th. A contract has been signed for the Boone and Scenic Valley train ride for our 25th anniversary celebration. Members are encouraged to bring a guest (spouse/friend). Member reservations and payment will be due in September. Part of the cost may be subsidized from our chapter funds. If anyone has any chapter history memorabilia or pictures, please get them to Karen. The committee is also still working on a workshop. The workshop will be on Saturday, October 10th and will be titled "So you said you would be Treasurer, now what?" Jan and Ann still need a speaker for this workshop.

Old Business:

- A. None

New Business:

- A. Recognition of the 2014-2015 Officers:
 - President: Theresa Samson
 - Vice President: Lisa Palmersheim
 - Secretary: Jaimie Williamson
 - Treasurer: Ann Kurtenbach
 - Past President: Kayla Sander
 - Program: Cindy Sippel, Karen Jacobson, and Jan Duffy
 - Membership: Margaret Munson and Elizabeth Bruns
 - Newsletter: Brenda O'Neall-Smith
 - Scholarship: Carla Danielson, Barbara Bennett, and Ann Kurtenbach
 - Webmaster: Margaret Munson
- B. Installation of the 2015-2016 Officers:
 - President: Lisa Palmersheim
 - Vice President: Jaimie Williamson
 - Secretary: Sara Kolbe
 - Treasurer: Ann Kurtenbach
 - Past President: Theresa Samson

Program: Cindy Sippel, Elizabeth Bruns, and Julie Luther
 Membership: Karen Jacobson and Marilyn Moehlmann
 Newsletter: Jodi Baker
 Scholarship: Barbara Bennett, Ann Kurtenbach, and Margaret Munson
 Webmaster: Margaret Munson

Announcements:

Adjournment: Meeting adjourned at 7:50 p.m.

Respectfully submitted,

Jaimie Williamson, Secretary

American Society of Women Accountants
 Ames Chapter #158
 Membership Meeting
 August 19, 2015

Call to Order: The August Membership Meeting of the Ames Chapter #158 was called to order by President Lisa Palmersheim at the IowaStater Restaurant in Ames at 7:25 pm on Wednesday, August 19, 2015. Those in attendance were members Libby Bruns, Cheryl Carlile, Jan Duffy, Karen Jacobson, Ann Kurtenbach, Julie Luther, Margaret Munson, Lisa Palmersheim, Theresa Samson, and Cindy Sippel and guest Phyllis Friedman. A quorum was present.

Minutes: Karen Jacobson moved and Libby Bruns seconded that the July minutes be approved as printed in the bulletin. Motion carried. Corrected June minutes will be distributed and considered for approval at a future membership meeting.

Treasurer's Report: Ann Kurtenbach presented the Treasurer's Report along with a draft budget with income based on an estimate of 26 regular members plus 4 with reduced dues. Margaret Munson moved and Karen Jacobson seconded that the budget be approved with a \$1,500 expense for the 25th Anniversary Celebration. Motion carried. The Treasurer's report will be placed on file for review.

Committee Reports



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- A. Membership: There are 30 members, plus the member from Texas. Six members are currently lapsed. The committee has contacted all lapsed members to encourage renewals. Phyllis Friedman indicated she will be joining the chapter shortly.
- B. Program: September's meeting will be the joint meeting with the Des Moines Chapter. Kristy Maitre will be the speaker and the meeting will be in Ankeny on the Ames Chapter's regular meeting night, Wednesday, September 16. October is the 25th Anniversary celebration on the Boone & Scenic Valley Railroad dinner train. State Auditor Mary Mosiman will be the speaker at the November meeting.
- C. Bulletin: Watch email for the bulletin reminder.
- D. Scholarship: Katelyn Pringnitz, one of the candidates our chapter sponsored, has been awarded an undergraduate scholarship from The Foundation.
- E. 25th Anniversary Celebration: The Evite will go out tomorrow, with RSVP's due September 18. Final payment is due to Boone and Scenic Valley Railroad on September 21. Members are encouraged to RSVP as soon as possible and to submit payment.
- F. Seminar: Jan Duffy, Ann Kurtenbach, and Cheryl Carlile have been working on the seminar. It will be held in the spring, since there have been challenges in getting speakers. Julie Luther will check with ISCPA about firms with expertise in Form 990.

Old Business: None

New Business:

- A. Delegates are needed for the Annual Conference in Pittsburgh in October. Jan Duffy moved and Cindy Sippel seconded that Karen Jacobson carry both votes and go informed.
- B. Standing rules will be reviewed in November.



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Announcements:

- National has discontinued Chapter Advocates. Volunteer experts will be available through National to help chapters with challenges.
- ISU will be having an accounting conference in December.

Adjournment: Meeting adjourned at 8:10 pm.

Respectfully submitted,
Margaret Munson, Acting Secretary

AMES CHAPTER OFFICERS

President: Lisa Palmersheim
Email: president@amesafwa.org

Vice President: Jamie Williamson
Email: vice-president@amesafwa.org

Secretary: Sara Kolbe
Email: secretary@amesafwa.org

Treasurer: Ann Kurtenbach
Email: treasurer@amesafwa.org

Past President: Teresa Samsom
Email: past-president@amesafwa.org

Program: Cindy Sippel
Elizabeth Bruns
Julie Luther
Email: programs@amesafwa.org

Membership: Karen Jacobson
Marilyn Moehlmann
Email: membership@amesafwa.org

Newsletter: Jodi Baker
Email: bulletin@amesafwa.org

Scholarship: Margaret Munson

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