



Accounting & Financial Women's Alliance

CONNECT • ADVANCE • LEAD

Ames Chapter

April 2016

# THE SPOKESWOMAN

Ames Chapter #158

## Websites

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

Local: <http://amesafwa.org>

### MISSION STATEMENT

*The mission of the Accounting & Financial Women's Alliance is to enable women in all accounting and finance fields to achieve their full potential and to contribute to their profession.*

### MEETING INFORMATION

"Integrated Reporting"

Wednesday, May 18<sup>th</sup>

The Iowa Stater Restaurant  
2100 Green Hills Dr, Ames, IA

**Presenter:** Cyndie Jeffrey Ph.D. CPA, Dean's Faculty Fellow in Accounting, Associate Professor of Accounting, Iowa State University  
**Field of Study:** Accounting  
**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](mailto: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](mailto: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](http://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](mailto:Cindy.Sippel@gafg.com) or 515-450-8670 or update your response on the Evite.

### NETWORKING LUNCHEON

TBD

Begins at 12:00 P.M.

Please RSVP through the separate evite being sent.



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## PRESIDENT'S MESSAGE

Hello Everyone,

Hopefully you are all enjoying the nice spring weather, although for those of us with a green thumb Mother Nature sure has given us plenty of rainy days.

If you haven't done so already, remember to complete the AFWA Membership Survey that should have been emailed out to you around April 27<sup>th</sup>. It should take about 15-20 minutes to complete and you will be entered into drawing for one of five AFWA National Memberships. Surveys need to be completed by Friday, May 13<sup>th</sup>.

There is also an opportunity to become an AFWA Lifetime Member. Applications were emailed out on May 2<sup>nd</sup>. This offer is being extended to the first 100 members to sign up before December 31, 2016. There is a one-time fee of \$1,200 or three monthly payments of \$400. For more information please check out this link.

<http://www.afwa.org/lifetime-membership/>

It's also that time of year to nominate the Member of the Year. If you have someone in mind that you would like to nominate, please send your nominations to Jaimie Williamson.

Lisa Palmersheim

## AGENDA

1. Call to Order
2. Quorum
3. Approval of Minutes (April)
4. Treasurer's Report
5. Committee Reports
  - a. Membership
  - b. Program
  - c. Bulletin
  - d. Scholarship
  - e. Treasurer's Workshop
6. Old Business
  - a. 2016-2017 Officer Nominations
  - b. Outstanding Member of the Year Committee
7. New Business
  - a. TBD
8. Announcements
9. Adjournment



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### 2016-2017 Proposed Slate of Officers

The nominating committee, comprised of Jaimie Williamson and Jan Duffy, announce the slate for 2016-2017:

- President: Jaimie Williamson  
Email: [president@amesafwa.org](mailto:president@amesafwa.org)
- Vice President: Elizabeth Bruns  
Email: [vice-president@amesafwa.org](mailto:vice-president@amesafwa.org)
- Secretary: Kayla Sander  
Email: [secretary@amesafwa.org](mailto:secretary@amesafwa.org)
- Treasurer: Catherine Mulder  
Email: [treasurer@amesafwa.org](mailto:treasurer@amesafwa.org)
- Past President: Lisa Palmersheim  
Email: [past-president@amesafwa.org](mailto:past-president@amesafwa.org)
- Program Coordinator: Ann Kurtenbach  
Email: [programs@amesafwa.org](mailto:programs@amesafwa.org)
- Membership: Jing Li  
Jan Duffy  
Email: [membership@amesafwa.org](mailto:membership@amesafwa.org)
- Newsletter: Cindy Sippel  
Email: [bulletin@amesafwa.org](mailto:bulletin@amesafwa.org)
- Scholarship: Theresa Samson  
Cheryl Carlile  
Catherine Mulder  
Email: [scholarship@amesafwa.org](mailto:scholarship@amesafwa.org)
- Webmaster: Margaret Munson  
Email: [webmaster@amesafwa.org](mailto:webmaster@amesafwa.org)

### MINUTES – April 2016

Accounting and Financial Women's Alliance  
Ames Chapter #158  
Membership Meeting  
April 20, 2016

#### Call to Order:

The April Membership Meeting of the Ames Chapter #158 was called to order by President Lisa Palmersheim at 7:29 p.m. on Wednesday, April 20, 2016, at The Iowa Stater Restaurant in Ames, Iowa. Those in attendance were members: Margaret Munson, Jan Duffy, Phyllis Friedman, Kayla Sander, Lisa Palmersheim, Theresa Samson, Marilyn Moehlmann, Cindy Sippel, Karen Jacobson, Cheryl Carlile, Elizabeth Bruns, and Kate Mulder.

Guests attending were Shelby Beilke and Mitchell Arnold, Iowa State University students and AWFA chapter scholarship recipients. Also, Angie Collett was in attendance as a guest of Cheryl Carlile.

A quorum was present.

#### Minutes:

Cindy Sippel moved that the minutes of the March meeting be approved as published in the April bulletin. The motion was seconded by Theresa Samson. Motion carried.

#### Treasurer's Report:

Ann Kurtenbach provided a copy of the Treasurer's Report to Lisa Palmersheim to present. Lisa presented the Treasurer's Report. The March report was handed out. The balance in the General Account as of March 31, 2016, is \$7,430.68. The balance in the Scholarship Account as of March 31, 2016, is \$1,434.19 with



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an unrestricted balance of \$234.19. The report will be placed on file for review.

### Committee Reports:

#### A. Membership:

1. Karen Jacobson reported that we currently have 23 active members. One member included in the active member list will drop at the end of May. Three members, which are not included in the active member list, will drop at month-end (April). Karen Jacobson encourages all members to promote our group to others.

#### B. Program:

1. Cindy Sippel reported that the programs are set for the remainder of the year. The upcoming presentations are as follows:
  - May – Cyndie Jeffrey, Dean's Faculty Fellow & Associate Professor of Accounting
  - June – Gary Botine, Vice President & CFO of Mary Greeley Medical Center, will present on the topic of Impact in Healthcare
  - July – Planning Meeting
2. Jan Duffy has agreed to arrange for Mike Duffy to present in August regarding farmland ownership and all topics related.

#### C. Bulletin:

1. No report.

#### D. Scholarship:

1. Margaret Munson presented the AFWA Ames Chapter Scholarship Award recipients, Shelby Beilke and Mitchell Arnold. A picture of the award presentation will be

placed in the Story County Sun. Congratulations to the recipients!

#### E. Treasurer's Workshop:

1. Jan Duffy and Margaret Munson reported that four registrations had been turned in at the time of the meeting. Eight individuals had expressed interest in response to the E-vite sent out. It is encouraged that all members help spread the word regarding the workshop opportunity. Margaret indicated that she would send all workshop materials out to our AFWA listing again. She has already posted all materials on our chapter website.

### Old Business:

#### A. 2016-2017 Officer Nominations

1. The proposed 2016-2017 slate of officers was published in the April bulletin and will be re-published in the May bulletin. The chapter will vote on the slate of officers at the May meeting.

#### B. Chapter Dues

1. AFWA National expressed concern to chapter President, Lisa Palmersheim, with the Ames chapter's decision to lower chapter dues to \$0 for the next year. Membership considered their viewpoints. The motion will stand.

#### C. Changes to Chapter Bylaws

1. Margaret Munson sent updates to the chapter bylaws to the chapter prior to the meeting. Karen Jacobson submitted some typo corrections via email to Margaret. Margaret provided handouts of the corrected updates at the meeting. All proposed updates were prompted to align with National.



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Karen Jacobson moved to accept the updates as presented at the meeting. The motion was seconded by Marilyn Moehlmann. Motion carried.

### New Business:

- A. Outstanding Member of the Year Committee
  - 1. Jaimie Williamson will remain chair of the Outstanding Member of the Year Committee. Marilyn Moehlmann and Cindy Sippel volunteered to serve on the committee and assist.

### Announcements:

- A. No announcements

Adjournment: Meeting adjourned at 8:17 p.m.

Respectfully submitted,

Kayla Sander, Secretary

## So You Said You'd be Treasurer- Now

### What?

It's not too late to register! The seminar, "So You Said You'd be Treasurer- Now What?" will be Saturday, May 7 from 8:30 a.m. to 12 p.m. To register, email [amesafwa@amesafwa.org](mailto:amesafwa@amesafwa.org) with your name, e-mail address, and whether you want CPE credit or not. Then bring your registration form and check to the seminar. The direct link to the conference page is: <http://amesafwa.org/Seminar.asp>

## MEMBER OF THE YEAR

It's that time of year again! Each year we select a member of our chapter who we feel is deserving of the "AFWA Member of the Year" award. Please submit your nominations for "AFWA Member of the Year" to the committee via Jaimie Williamson ([jwilliamson@hawkeye-re.com](mailto:jwilliamson@hawkeye-re.com)) by **Monday, May 23<sup>rd</sup>**. We will be announcing this year's award winner at the June meeting.

## BEVERLY M. WANDLING MEMORIAL

### SCHOLARSHIP

At our April meeting, the Chapter presented 2016 Beverly M. Wandling Memorial Scholarships to Iowa State University students Mitchell Arnold and Shelby Beilke. Mr. Arnold is an undergraduate accounting student from Independence, Iowa, and Ms. Beilke is a graduate student in accounting from Humboldt, Iowa. We were pleased to have them as our guests at the April meeting.

## PROGRAM SCHEDULE

May – Cyndie Jeffrey, Dean's Faculty Fellow & Associate Professor of Accounting

June – Gary Botine, Vice President & CFO of Mary Greeley Medical Center, will present on the topic of Impact in Healthcare

July – Planning Meeting



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### AMES CHAPTER OFFICERS

President: Lisa Palmersheim  
Email: [president@amesafwa.org](mailto:president@amesafwa.org)

Vice President: Jaimie Williamson  
Email: [vice-president@amesafwa.org](mailto:vice-president@amesafwa.org)

Secretary: Kayla Sander  
Email: [secretary@amesafwa.org](mailto:secretary@amesafwa.org)

Treasurer: Ann Kurtenbach  
Email: [treasurer@amesafwa.org](mailto:treasurer@amesafwa.org)

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

Program: Cindy Sippel  
Elizabeth Bruns  
Julie Luther  
Email: [programs@amesafwa.org](mailto:programs@amesafwa.org)

Membership: Karen Jacobson  
Marilyn Moehlmann  
Email: [membership@amesafwa.org](mailto:membership@amesafwa.org)

Newsletter: Jodi Baker  
Email: [bulletin@amesafwa.org](mailto:bulletin@amesafwa.org)

Scholarship: Margaret Munson  
Theresa Samson  
Ann Kurtenbach  
Email: [scholarship@amesafwa.org](mailto:scholarship@amesafwa.org)

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

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