



Accounting & Financial Women's
CONNECT • ADVANCE • LEAD
Ames Chapter

June 2016

Ames Chapter #158

THE
SPOKESWOMAN

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

"Accounting and the Health Care Industry"

Wednesday, June 15th

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

Presenter: Gary Botine, CPA, CFO Mary Greeley Medical Center

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. 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

TBD

Begins at 12:00 P.M.

Please RSVP through the separate evite being sent.



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PRESIDENT'S MESSAGE

Looks like I'm going to end our year with a bang and submit my Presidents message a little late. Sorry Jaimie!! These past two weeks, I feel like I've been on a wild and crazy ride called life as I've been training for a new position as a Financial Analyst. My biggest goal is to try and retain everything I learn over the next two months for when I return from maternity leave in November.

Thank you everyone for another great year for the Ames AFWA chapter. I would like to give an extra special thank you for everyone who helped with the 25th Anniversary Celebration and with our Treasurers Workshop. Your efforts are greatly appreciated by everyone.

It has been a pleasure to have the opportunity to serve as your President.

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

SYMPATHIES

Our sympathies to Penny Strum and Stephanie Roscoe on the passing of Penny's father Stan Strum recently. Our thoughts and prayers are with you and your family.

So You Said You'd be Treasurer- Now

What?

On May 7, 2016 we hosted the workshop "So You Said You'd be Treasurer – Now What?" as part of our 25th anniversary celebration. We had 21 participants (including presenters). The reviews were very positive and we made over \$1,000 for the scholarship fund.

I'd like to thank all who helped us.

Annmarie Kurtenbach created a great outline of material and was an amazing resource for the presenters as well as managing the finances for the event. Margaret Munson was outstanding in her efforts at publicity and the web presence. Julie helped with marketing and did a great job arranging the food for the event. Marilyn Moehlmann stepped up wherever needed and offered valuable insights. Cheryl Carlile did a great job speaking during a very busy time in her life.

Special thanks to Katie New from RSM for speaking. Her knowledge was amazing and she was a lot of fun! And thanks to Libby Bruns for getting Katie on board for us.

The Iowa State College of Business graciously let us use a room. We are considering making this an annual event so any feedback member have is welcome.

Jan Duffy, CPA



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AMES CHAPTER OFFICERS

President: Lisa Palmersheim
Email: president@amesafwa.org

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

Secretary: Kayla Sander
Email: secretary@amesafwa.org

Treasurer: Ann Kurtenbach
Email: treasurer@amesafwa.org

Past President: Theresa Samson
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
Theresa Samson
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