



Accounting & Financial Women's Alliance

CONNECT • ADVANCE • LEAD

Ames Chapter

October 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

### Office Motivation What Motivates You?

Date: **Tuesday**, October 18, 2016

Time: 5:30 - 7:00

**Joint Meeting with Des Moines Chapter  
- Note Date and Location**

Location: **The Iowa Clinic  
Ankeny Campus  
1410 SW Tradition Drive  
Ankeny, IA 50021**

**Presenter:** Sandy McCarty

**Field of Study:** Personal Development

**Program Level:** Basic

**Program Prerequisites/Advance Preparation:**  
None

**Instructional Delivery Method:** Group Live  
**Recommended Amount of CPE Credit:** 1  
credit hour

**Administrative Policies:** Please register through the Des Moines Chapter website  
<http://www.desmoinesafwa.org/meetings> Meals will be individual bills. If you would like to

make or cancel a reservation and did not receive a separate invite, please send an email to Jen Johnson at [Johnson.jennifer@principal.com](mailto:Johnson.jennifer@principal.com) For more information regarding administrative policies such as complaint and refund, please contact Ames Chapter Program Co-Chair, Annmarie Kurtenbach at [Annmarie.kurtenbach@gmail.com](mailto:Annmarie.kurtenbach@gmail.com).

### 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)

Please register through the Des Moines chapter website

<http://www.desmoinesafwa.org/meetings>

If you must change your registration after that time, please send an email to Jen Johnson at

[Johnson.jennifer@principal.com](mailto:Johnson.jennifer@principal.com)

## PRESIDENT'S MESSAGE

Since starting my new job and beginning my master's degree program, I have had to face many challenges both professionally and



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personally. Professionally I've been challenged by learning a new industry, developing relationships with my co-workers, integrating our accounting software program into a new software program, and all the other news things that occur during a job transition. Personally, I have been working harder than ever to achieve success at work and in my academics while overcoming the challenges I've faced.

I remember looking at my first master's degree class assignment and thinking to myself "I can't do this." The assignment just looked too difficult, I knew it would take a lot of time I didn't have (re-learning APA citation), and I just didn't think I was smart enough. A little over a week later, at 4:30 a.m. on a Sunday morning, I got to hit the submit button on my first class assignment. Two and a half hours later my dear grandpa passed away. Someway, somehow, I have been able to tap into my drive and determination to continue through work and school, while balancing new family obligations. I am happy to state that on Sunday, September 25<sup>th</sup> somehow, somehow, I got to hit the submit button on my final assignment for my first class and I passed the class. We are all faced with a unique set of challenges depending on where we are at in our age, career, life, etc., if any of you are facing a challenge and think "I can't", you can! Reach out to your fellow

AFWA members for support and encouragement.

*I've always found that anything worth achieving will always have obstacles in the way and you've got to have that drive and determination to overcome those obstacles on route to whatever it is that you want to accomplish.* Chuck Norris

October is our joint meeting month with the Des Moines AFWA Chapter. The Des Moines AFWA Chapter will be hosting the joint meeting and there will be no business meeting. This will be a great evening to network by connecting with old friends and possibly making new ones, while enjoying an interesting program and a good meal. Unfortunately, I will not be able to make it to our October meeting as I will be undergoing my first bank audit that week (challenge accepted), but I look forward to seeing you in November.

Jaimie

**NETWORKING LUNCHEON**

TBD

Begins at 12:00 P.M.

Please RSVP through the separate invite being sent.



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### 2016 NATIONAL AFWA CONFERENCE



OCTOBER 26 - 28  
DENVER, COLORADO

### 2016-2017 SLATE OF OFFICERS

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)

### Upcoming Meetings

October 18 (note: Tuesday) – Joint Meeting  
with the Des Moines chapter.

Office Motivation – Sandy McCarty

November 16 - TBD

December - Christmas Party TBD

### MINUTES – September 2016

Accounting and Financial Women's Alliance  
Ames Chapter #158  
Membership Meeting  
September 21, 2016

#### Call to Order:

The September Membership Meeting of the Ames Chapter #158 was called to order by President Jaimie Williamson at 7:32 p.m. on Wednesday, September 21, 2016, at Battlecry Iowa Smokehouse in Ames, Iowa. Those in attendance were members: Ann Kurtenbach, Kayla Sander, Theresa Samson, Marilyn Moehlmann, Jaimie Williamson, Cindy Sippel, Karen Jacobson, Elizabeth Almond, Catherine Mulder, Brenda O'Neill-Smith, and Cheryl Carlile.



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A quorum was present.

### Minutes:

Karen Jacobson moved that the minutes of the August meeting be approved as published in the September bulletin. The motion was seconded by Cheryl Carlile. Motion carried.

### Treasurer's Report:

Catherine Mulder presented the Treasurer's Report. The August report was handed out. The balance in the General Account as of August 31, 2016, is \$7,274.00. The balance in the Scholarship Account as of August 31, 2016, is \$2,398.03 with an unrestricted balance of \$2,398.03. The report will be placed on file for review.

Jaimie Williamson noted that Ann Kurtenbach will remain a signer on the chapter account at U.S. Bank.

### Committee Reports:

#### A. Membership:

1. No report

#### B. Program:

1. It was noted that Margaret Munson emailed the host and program coordinator duties list to the chapter as well as posted the list on the chapter website.
2. The upcoming program duties/plans are as follows:  
**October** – Joint Meeting with Des Moines Chapter – Tuesday, Oct. 18<sup>th</sup> – Office Motivation by Sandy McCarty  
**November** – Margaret Munson will plan  
**December** – Holiday Party

**January** – No meeting

**February** – Cheryl Carlile will plan

**March** – Cindy Sippel will plan

**April** – TBD

**May** – Libby Almond will plan – Retirement Planning

**June** – Lisa Palmersheim will plan

#### C. Bulletin:

1. No report

#### D. Scholarship:

1. Karen Jacobson noted that the chapter had issued a \$300 check that will be taken to the National Meeting and given to the Education Foundation Scholarship.
2. Karen Jacobson noted that the National Education Foundation Scholarship applications are final and posted online.
3. Cheryl Carlile and Theresa Samson will update the chapter scholarship application form and have Margaret repost the updated version on our chapter website.

### Old Business:

#### A. Delegates for AFWA Annual Business Meeting (2) – Thursday, October 27<sup>th</sup> in Denver, Colorado

1. Jaimie Williamson reminded the chapter that Karen Jacobson and Kate Mulder were voted to both serve as delegates and alternates on behalf of our chapter at the AFWA Annual Business Meeting.

#### B. Program Coordinator and Host Responsibilities

1. Covered in Program Committee Report



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#### C. Social Media Committee

1. Jaimie Williamson reminded the chapter that Lisa will be starting a chapter social media committee to likely begin work in November.

#### New Business:

##### A. Founders Day Award Nominating Committee

1. Jaimie Williamson reported that the Founders Day Award Nominating Committee consists of Libby Almond, Cindy Sippel, Cheryl Carlile, and Kayla Sander. The committee has received two nominations for consideration. The Founders Day Award is planned to be awarded at the November chapter meeting.
2. It was noted that details regarding the Founders Day Award can be found in the chapter's standing rules.

##### B. Treasurer's Workshop Committee

1. There was discussion on whether to hold a CPE workshop this year, what the topic would be, what changes would make the workshop more appealing and better attended, etc. It was reinforced that a workshop planning committee needs to be assembled to cover these issues and possibly plan the next workshop.
2. Due to the absence of key members of our last workshop planning committee, the item was tabled until the November meeting.

#### Announcements:

- A. Lisa and her husband and son welcomed a beautiful baby girl, Kayla Renee, into their family! Congratulations Lisa!
- B. Cheryl's son, Ben, went off to college at the University of Iowa and loves it! Congratulations Cheryl & Ben!
- C. Libby and her husband, CJ, have an accepted offer on a house in Ankeny and plan to close around October 14<sup>th</sup>! Congratulations Libby & CJ!
- D. Libby shared an interesting article regarding the benefits of having a mentor and how to create effective workplace communication. She would be happy to share if you are interested!

Adjournment: Meeting adjourned at 8:01 p.m.

Respectfully submitted,

Kayla Sander, Secretary

**Proposed By-Law Changes**

October 6, 2016

The Bylaws committee is recommending three potential amendments for our members to consider. These amendments are meant to clarify and simplify our processes going forward. We are requesting feedback from the membership before moving forward with any formal amendments.

**Review and Feedback**



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- A Bylaws Forum will be held during the upcoming AFWA National Conference in Denver. This forum will provide an in-person opportunity for clarity and discussion of the proposed amendments.
- Suggested changes to the proposed amendments should be sent in writing to AFWA Headquarters by October 31, 2016. Changes can be mailed; faxed to 859-219-3532; or emailed to [ericka.harney@afwa.org](mailto:ericka.harney@afwa.org).

Hearing all submitted comment from the membership, the National Board will send official proposed amendments via postal mail ballot for chapter vote, as permitted by Article X, Section 1, Part b of the AFWA Bylaws.

## Chapter Voting

A ballot will be mailed on November 8, 2016 to each Chapter via postal mail to the current mailing address on file for each Chapter. Chapter Presidents should log on to the AFWA Chapter Dashboard to ensure their Chapter mailing address is up to date. All ballots must be returned via mail, email or fax by December 9, 2016. Detailed instructions for voting will be included for returning them.

## Next Steps

The ballot will present three bylaw amendments as described below. Please use time between now and the October 31 deadline to discuss these amendments with your chapter members. Prepare Chapter

delegates with questions and comments to present during the Bylaw Forum during the National Conference or provide changes in writing to headquarters. And be on the lookout for your Chapter's mailed ballot after November 8.

## Recommended Bylaw Changes for Vote after the 2016 National Conference

### PROPOSED AMENDMENT 1 -

**Recommendation: Change the membership classes, remove student from associate membership and create a Student membership category:**

Current Bylaw	Proposed Amendment	Bylaw if Adopted
Article III Members Section 1. There shall be six classes of membership: regular, associate, affiliate, retired, honorary, and emeritus. A. Regular B. Associate 1. Qualifications: a. Regularly enrolled students in post-secondary	Add Student to Section 1.  Add Subsection D. Student  Re-label Subsection D. Retired to E. Retired.  Re-label Subsection E. Honorary to F. Honorary.  Re-label Subsection	Article III Membership Section 1. There shall be seven classes of membership: regular, associate, affiliate, student, retired, honorary, and emeritus. A. Regular B. Associate 1. Qualifications a. Actively engaged in accounting or



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educational institutions, majoring in accounting, finance, or its equivalent, or b. Actively engaged in accounting or finance with less than two years' experience. c. Limited to two years following attainment of qualifications for regular membership and a maximum of seven years. 2. Shall vote but may not hold elective office except at the chapter level, if authorized in the chapter bylaws. C. Affiliate D. Retired E. Honorary F. Emeritus	F. Emeritus to G. Emeritus.	finance with less than two years' experience. b. Limited to two years following attainment of qualifications for regular membership and a maximum of seven years. 2. Shall vote but may not hold elective office except at the chapter level, if authorized in the chapter bylaws. C. Affiliate D. Student 1. Qualifications a. Regularly enrolled students in post-secondary educational institutions, majoring in accounting, finance, or its equivalent; b. Limited to			two years following attainment of qualifications for regular membership and a maximum of seven years. 2. Shall vote but may not hold elective office except at the chapter level, if authorized in the chapter bylaws. E. Retired F. Honorary G. Emeritus
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**Rationale:** By simplifying the membership types, members and potential members are not confused as to what kind of member they are. This also further promotes student membership by having an official student membership category.

**PROPOSED AMENDMENT 2 -**  
**Recommendation:** Move voting responsibilities from chapters to individual members, providing all members with equal vote. This would also allow for electronic ballots, staying relevant with technological changes in the industry.





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Current Bylaw	Proposed Amendments	Bylaw if Adopted
ARTICLE VI MEETINGS Section 1. The annual meeting shall be held at a time and place determined by the Board of Directors. Notice of such meeting shall be sent to the membership at least forty-five days prior to the date of the meeting. Section 2. Special meetings may be called by a two-thirds vote of the Board of Directors or at the request of two-thirds of the chapters. Section 3. The members at	Replace "two-thirds of the chapters" with "200 members"  Add "or electronic" ballot.  Change "delegate" to "member" and delete all verbiage related to how the delegates are calculated.	ARTICLE VI MEETINGS Section 1. The annual meeting shall be held at a time and place determined by the Board of Directors. Notice of such meeting shall be sent to the membership at least forty-five days prior to the date of the meeting. Section 2. Special meetings may be called by a two-thirds vote of the Board of Directors or at the request of 200 members. Section 3. The members at

a special or annual meeting, or the Board of Directors, may direct the president to submit a motion to the membership for a vote by mail ballot. Section 4. Voting at meetings and by mail ballot shall be by delegate vote. The delegate votes for the next fiscal year shall be based on the membership as of 30 days before the last day of the fiscal year. A. Each chapter shall have one delegate plus one delegate for each 25 members or fraction thereof.	Remove subsections A, B, C & D.  Add Proxy votes are "not" permitted and delete all verbiage regarding proxy voting.  Remove sections A&B.	a special or annual meeting, or the Board of Directors, may direct the president to submit a motion to the membership for a vote by mail or electronic ballot. Section 4. Voting at meetings and by mail or electronic ballot shall be by member vote
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<p>B. There shall be one member-at-large delegate for each 25 members-at-large or fraction thereof, to be elected at the annual meeting to serve until the next annual meeting.</p> <p>C. There may be an alternate for each allowable delegate.</p> <p>D. A delegate may carry more than one vote if so ordered.</p> <p>Section 5. Proxy votes are permitted at the annual or special meetings.</p> <p>A. A chapter may have a member of another</p>	<p>Remove "except as delegates".</p> <p>Remove old definition of quorum based on chapters and state new definition under member voting by adding subsection A &amp; B</p>	<p>Section 5. Proxy votes are not permitted.</p> <p>Section 6. The National Board members and committee chairs shall have the</p>	<p>chapter carry its proxy votes.</p> <p>1. A chapter may carry the proxy votes of only two chapters.</p> <p>2. If the proxy votes for a chapter are carried by a delegate who is unable to serve, that delegate's alternate shall carry all the votes which were carried by the delegate</p> <p>B. A member-at-large delegate may have another member carry their proxy votes at a special meeting.</p> <p>Section 6. The National board members and committee</p>	<p>privilege of making motions but shall have no right to vote.</p> <p>Section 7. Quorum</p> <p>A. A majority of registered members present at the annual or special meeting shall constitute a quorum.</p> <p>B. A quorum for a mail or electronic ballot is met when a minimum of 200 members record a vote. Two-thirds approval, of the votes recorded, is required to approve the proposal.</p>
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chairs shall have the privilege of making motions but shall have no right to vote, except as delegates. Section 7. A majority of chapters represented by registered delegates or proxies shall constitute a quorum.		
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**Rationale:** Simplification of AFWA's voting practices. The existing system is confusing and cumbersome. Changing our voting procedures ensures each member will have a voice in the matters of AFWA and that we stay relevant with technology.

### PROPOSED AMENDMENT 3 -

**Recommendation:** Change Article X to reflect voting structure changes, should the proposed changes to Article VI pass.

Current Bylaw	Proposed Amendment	Bylaw if Adopted
ARTICLE X - AMENDMENT OF BY LAWS Section 1. These bylaws	Replace the	ARTICLE X - AMENDMENT OF BY LAWS Section 1. These bylaws

may be amended: A. At any meeting by a two-thirds vote provided notice of the proposed amendment has been sent to each chapter at least forty-five days prior to the meeting. B. By mail ballot, by a two-thirds vote, provided votes have been received from three-fourths of the chapters. Section 2. Amendments to these bylaws may be proposed by the board of directors, or by a chapter. An amendment proposed by a chapter must have been approved at a chapter	word "chapter" with "member"  Add "or electronic" ballot and use the same definition for quorum as defined above.	may be amended: A. At any meeting by a two-thirds vote provided notice of the proposed amendment has been sent to each member at least forty-five days prior to the meeting. B. By mail or electronic ballot, by a two-thirds vote, provided votes have been received from at least 200 members. Section 2. Amendments to these bylaws may be proposed by the board of directors, or by a chapter. An amendment proposed by a chapter must have been approved at a chapter
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meeting by a two-thirds vote with thirty days' notice. The proposed amendment must be received by the national president and national president elect by June 30. The board of directors may make necessary changes in the proposed bylaw amendment to keep it consistent with the current by-laws and in proper parliamentary form.		meeting by a two-thirds vote with thirty days' notice. The proposed amendment must be received by the national president and national president elect by June 30. The board of directors may make necessary changes in the proposed bylaw amendment to keep it consistent with the current by-laws and in proper parliamentary form.
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**Rationale:** Change Article X to reflect member voting, should previous proposed amendment to Section VI - Meetings, pass

## Announcements

Lisa Palmersheim is excited to announce the birth of her daughter:

Kayla Renee Palmersheim  
Born August 23<sup>rd</sup> at 6:03pm  
7lb 13oz  
20 in long





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## Foundation Scholarships!

Attention Members!

Are you interested in furthering your career by getting your CPA or CMA? The Foundation has several scholarships for CPA and CMA review courses donated by Wiley. Just go to The Foundation website <http://www.afwa.org/foundation/scholarships> and print off the application. The due date is November 1, 2016. It just takes a few minutes to apply. As a member of The Foundation Board, I have seen times when these course scholarships have not been given out because not enough people applied. So please **take** the time to further your career by applying for the CPAexcel and CMAexcel review courses today.

Karen Jacobson

## Quote of the Month



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