



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

November 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

Taxing Issues for Foreign Students and Scholars; Lessons from the VITA Program

This program will focus on the taxation of international students and scholars. These issues include residency status, social security, and tax treaties that many are subject to. Additionally, there will be a discussion of the VITA program and how to participate.

Date: Wednesday, November 16, 2016
Time: Networking 5:30; Speaker 6:00;
Dinner and Meeting 7:00

Note Meeting Location

Location: **Battlecry Iowa Smokehouse and Bar**

**823 Wheeler Street; #1
Ames, IA 50010**

This is where Valentino's was located in Northern Lights in North Ames

Presenter: Jan Duffy
Adjunct Instructor of Accounting
Coordinator, Master of Accounting Program
College of Business
Iowa State University

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: Please respond to the invite. 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 Annmarie Kurtenbach at Annmarie.kurtenbach@gmail.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.

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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PRESIDENT'S MESSAGE

I hope you are all enjoying our fabulous fall weather! At our November meeting we'll be presenting our Founder's Day Award and will also be planning our annual holiday party.

Hope to see you at our November meeting,

Jaimie

NETWORKING LUNCHEON

TBD

Begins at 12:00 P.M.

Please RSVP through the separate evite being sent.

2016-2017 SLATE OF OFFICERS

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

Upcoming Meetings

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



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Moehlmann, Jaimie Williamson, Cindy Sippel, Karen Jacobson, Elizabeth Almond, Catherine Mulder, Brenda O'Neill-Smith, and Cheryl Carlile.

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.

18th – 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 27th 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.



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B. Program Coordinator and Host Responsibilities

1. Covered in Program Committee Report

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 14th! 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

Quote of the Month



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