



## Accounting & Financial Women's Alliance

CONNECT • ADVANCE • LEAD

*Ames Chapter*

March 2017

# 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

#### Tax Update

Kristy Maitre will be presenting a Tax Update

Date: Wednesday, **March 15, 2017**

Time: Networking 5:30; Speaker 6:00;

Dinner and Meeting 7:00

#### Note Meeting Location

Location: **The Iowa Stater**

**Gateway Hotel and Conference Center**

**2100 Green Hills Drive  
Ames, IA 50014**

**Presenter:** Kristy Maitre, Tax Specialist, Center for Agricultural Law and Taxation

**Learning Objectives & Program Content:** This program will discuss tax law updates, new legislation and changes to existing laws.

**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](mailto: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](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)



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### **PRESIDENT'S MESSAGE**

I hope those of you who are in the depths of tax and audit season are surviving. I am currently in the middle of my first audit at work and it has been interesting to say the least. I also prepare tax returns on the side and I am half-way through my client returns, hoping to be done with all of them by April 1<sup>st</sup>. Also, in my City Clerk position this is the time for budgeting for fiscal year 2018. Overall, this 1<sup>st</sup> quarter 2017 has been a very busy time.

At this month's meeting we will be discussing chapter bylaw changes (to make our bylaws in accordance with the new National bylaws), chapter dues rates, and the proposed slate of officers for 2017-2018. Thank you to those who volunteered for roles at our last meeting.

Hope to see you at our meeting,

Jaimie

### **NETWORKING LUNCHEON**

Networking Lunch	Meeting Date	Restaurant	Location
Monday, March 27, 2017	15-Mar-17	Mary Kay's Flowers and Garden Café	3134 Northwood Dr, Ames
Thursday, April 27, 2017	19-Apr-17	El Azteca	2727 Stange Rd., Ames
Wednesday, May 31, 2017	17-May-17	Stomping Grounds	303 Welch Ave., Ames
Thursday, June 29, 2017	21-Jun-17	The Café	2616 Northridge Pkwy, Ames



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## 2016-2017 SLATE OF OFFICERS

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

Vice President: Elizabeth Bruns Almond  
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)

## Agenda

1. Call to Order
2. Quorum
3. Approval of Minutes (February)
4. Treasurer's Report
5. Committee Reports
  - a. Membership
  - b. Program
  - c. Bulletin
  - d. Scholarship
  - e. Social Media
6. Old Business
  - a. 2017-2018 Nominating Committee
7. New Business
  - a. Chapter Dues Rates 2017-2018
  - b. Chapter bylaw changes
8. Announcements
9. Adjournment



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### **Upcoming Meetings**

- April 19, 2017 – Ames Police Department – Self Defense, The Iowa Stater
- May 17, 2017 – Retirement Planning
- June 21, 2017 – How to Conduct Productive Meetings – Lisa Palmersheim

### **MINUTES – February 2017**

Accounting and Financial Women's Alliance  
Ames Chapter #158  
Membership Meeting  
February 15, 2017

#### Call to Order:

The February Membership Meeting of the Ames Chapter #158 was called to order by President Jaimie Williamson at 7:43 p.m. on Wednesday, February 15, 2017, at The Iowa Stater in Ames, Iowa. Those in attendance were members:

Ann Kurtenbach, Margaret Munson, Kayla Sander, Lisa Palmersheim, Theresa Samson, Jaimie Williamson, Cindy Sippel, Jan Duffy, Cheryl Carlile, and Becky Musselman.

A quorum was present.

#### Minutes:

Cindy Sippel moved that the minutes of the November meeting be approved as published in the February bulletin. The motion was seconded by Cheryl Carlile. Motion carried.

#### Treasurer's Report:

Catherine Mulder provided the materials for Ann Kurtenbach to present the Treasurer's Report. The November, December, and January reports were handed out. The balance in the General Account as of November 30, 2016, is \$7,274.88. The balance in the Scholarship Account as of November 30, 2016, is \$2,098.30 with an unrestricted balance of \$2,098.30.

The balance in the General Account as of December 31, 2016, is \$7,275.18. The balance in the Scholarship Account as of December 31, 2016, is \$5,598.46 with an unrestricted balance of \$2,998.46.

The balance in the General Account as of January 31, 2017, is \$7,275.48. The balance in the Scholarship Account as of January 31, 2017, is \$5,598.69 with an unrestricted balance of \$2,998.69.

The reports will be placed on file for review.

#### Committee Reports:



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### A. Membership:

1. Margaret Munson set up a list of networking lunches which were posted in the February bulletin.
2. Jan Duffy discussed possible efforts to recruit college students and young professionals. One idea was to reach out to the student organization Collegiate Women in Business (CWIB) at Iowa State University. Another possibility would be to reach out to the Young Professionals of Ames (YPA) group.
3. Jan Duffy reported that the meeting date survey results indicated no better date for our monthly meetings. Margaret Munson moved that the Ames chapter meeting date remain the 3<sup>rd</sup> Wednesday of the month. The motion was seconded by Lisa Palmersheim. Motion carried.

### B. Program:

1. The upcoming program duties/plans are as follows:  
**March** – Cheryl Carlile will plan – Kristie Maitre to discuss tax updates (Iowa Stater)

**April** – Karen Jacobson will plan – Self Defense w/ Ames Police (Iowa Stater)

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

**June** – Lisa Palmersheim will plan

2. Ann Kurtenbach requested that the person who schedules the speaker each month also takes responsibility for calling the restaurant the day before the meeting to confirm the reservation and all technical needs for the presentation.

### C. Bulletin:

1. Margaret Munson reported that the February 2017 bulletin was originally sent out listing the date as January 2017. She corrected the date on the bulletin before posting it to the chapter website. Any member who would like an updated copy may find it there.

### D. Scholarship:

1. The scholarship committee reported that they had not received any scholarship applications. One email was received by the committee on February 15, 2017 from a



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student interested in the Beverly M. Wandling scholarship. Nothing had been received for the Kathleen M Strum memorial scholarship. Theresa Samson moved that the scholarship application deadlines for both scholarships be moved to March 1, 2017. The motion was seconded by Margaret Munson. Motion carried. Kayla Sander is responsible for distributing scholarship information and updated deadline to Iowa State University accounting faculty and for posting to Blackboard at Iowa State for all undergraduate and graduate accounting majors. Cheryl Carlile is responsible for contacting ISU scholarships. Margaret Munson is responsible for updating the chapter website with the new deadline.

### E. Social Media:

1. Lisa Palmersheim reported that due to busy schedules, the social media committee has not been able to meet yet, but will plan to meet in a couple of months.

Old Business:

### A. Founders Day Award

1. The chapter would like to congratulate Jan Duffy on receiving the Founders Day Award! Cindy Sippel presented Jan with the award and read the very nice nomination that was submitted on her behalf. Thank you for all you do for our group Jan!

### B. AFWA National Bylaw Amendments

1. Jamie Williamson reminded the chapter of the three national bylaw amendments that were recently passed. These amendments can be found in the email sent to each member from National. Margaret stated that these changes will go into effect July 1<sup>st</sup> and suggested that our chapter decide on how this will impact our chapter bylaws before that date. Margaret Munson and Cindy Sippel volunteered to create a proposal of chapter bylaw amendments to move forward.

### C. Treasurer's Workshop Committee

1. The chapter decided on not holding a workshop this year.

New Business:



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- A. 2017-2018 Nominating Committee & Chair
1. Lisa Palmersheim will serve as the nominating committee chair as past president. Jan Duffy volunteered to serve on the committee. An outreach is to be made to Karen Jacobson for possible willingness to serve on this committee. If any member is interested in serving in a specific role, please don't hesitate to reach out to the committee!

### Announcements:

- A. 2017-2018 National Membership Dues- Starting July 1, 2017
- Regular Member: \$199
  - Affiliate Member: \$199
  - Associate Member: \$99
  - Student Member: \$45 (pending proposed bylaw change)
  - Retired Member: \$75
  - Member Emeritus: \$0

Adjournment: Meeting adjourned at 8:44 p.m.

Respectfully submitted,

Kayla Sander, Secretary

### Quote of the Month

A woman is like a tea bag - you can't tell how strong she is until you put her in hot water.

Eleanor Roosevelt

BrainyQuote®

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