



Accounting & Financial Women's Alliance

CONNECT • ADVANCE • LEAD

Ames Chapter

May 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

Wealth Management - A CPA's Perspective

Presented by: Kevin Lors, CPA, CFP, MTax

Date: Wednesday, May 17, 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: Kevin Lors, CPA, CFP, MTax

Learning Objectives & Program Content:

Participants will gain an understanding of how wealth management is implemented in a CPA firm including a focus on financial planning and a solid investment philosophy.

Field of Study: Personal Financial Planning

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 all of you are enjoying spring. Although we have had quite a few cold and rainy days, I love the foliage and greenery. It's also that time of year to nominate the Member of the Year. If you have an AFWA member you'd like to nominate, please send your nominations to Libby libbybruns@gmail.com.

AFWA Lifetime Membership is still available for \$1,200. The membership pays for itself after 6 years and payment may be made in total, three installments, or six installments. This is a great opportunity for members!

I'm looking forward to seeing you at our meeting,

Jaimie

NETWORKING LUNCHEON

Networking Lunch	Meeting Date	Restaurant	Location
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

Vice President: Elizabeth Bruns Almond
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

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. Social Media
6. Old Business
 - a. 2017-2018 Officer Nominations
 - b. Chapter bylaw changes
 - c. Outstanding Member of the Year Committee
7. New Business
8. Announcements
9. Adjournment

Upcoming Meetings

- June 21, 2017 – How to Conduct Productive Meetings – Lisa Palmersheim



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MINUTES – April 2017

Call to Order:

The April Membership Meeting of the Ames Chapter #158 was called to order by President Jaimie Williamson at 6:09 p.m. on Wednesday, April 19, 2017, at The Iowa Stater in Ames, Iowa. Those in attendance were members Kayla Sander, Lisa Palmersheim, Theresa Samson, Jaimie Williamson, Cindy Sippel, Karen Jacobson, Catherine Mulder, Elizabeth Almond, Brenda O'Neill-Smith, Stephanie Roscoe, and Penny Strum. Guests in attendance were Shelby Beilke, Marilyn Moehlmann, Carla McLaughlin, and Jael Kulp.

A quorum was present.

Minutes:

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

Treasurer's Report:

Catherine Mulder presented the Treasurer's Report. The March report was handed out. The balance in the General Account as of March 31, 2017, is \$7,105.70. The balance in the Scholarship Account as of March 31, 2017, is \$5,774.14 with an unrestricted

balance of \$1,174.14. The report will be placed on file for review.

Committee Reports:

- A. Membership:
 - 1. Karen Jacobson reported that we currently have 18 active members.
- B. Program:
 - 1. The upcoming program duties/plans are as follows:
May – Elizabeth Almond will plan – Retirement Planning
June – Lisa Palmersheim will plan & present – How to Conduct Productive Meetings
- C. Bulletin:
 - 1. No report
- D. Scholarship:
 - 1. On behalf of the scholarship committee, Theresa Samson presented Jael Kulp with a \$1,000 scholarship certificate. Theresa will send the announcement to the Quad Cities Times, Jael's hometown newspaper, and the Ames Tribune.
- E. Social Media



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1. Lisa will contact the committee members for a meeting in the near future.

Old Business:

A. 2017-2018 Nominating Committee

1. Catherine Mulder moved to approve the 2017-2018 slate of officers as presented by the nominating committee. The motion was seconded by Brenda O'Neill-Smith. Motion carried.
2. The installation of officers will be held at the June meeting.

B. Chapter Dues Rates 2017-2018

1. Jaimie Williamson presented the chapter dues by class as she reported them on our paperwork for National. Some of these classes were not addressed in the March chapter vote on dues rates for 2017-2018.

a. regular member	\$20
b. affiliate member	\$20
c. associate member	\$5
d. student member	\$5
e. retired member	\$5
f. emeritus member	\$0

Karen Jacobson moved to approve the new classes of dues which were not covered by the March motion and vote. The

motion was seconded by Elizabeth Almond. Motion carried.

C. Chapter bylaw changes

1. This was tabled until the April meeting.

New Business:

A. Outstanding Member Award Committee

1. The Outstanding Member Award Committee will be chaired by President-Elect, Elizabeth Almond. Kayla Sander and Karen Jacobson volunteered to serve on the committee with Elizabeth.

Announcements:

- A. Our deepest sympathies and condolences to Lisa Palmershiem on the passing of her sister, Renee Lembke.
- B. Kayla Sander reminded the group about the four credits of CPE that would be offered through the Voorhees Supply Chain Conference on Friday, April 28th. The registration fee is \$25. It is expected that more opportunities like this will be available through the



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Iowa State University College of
Business.

Adjournment: Meeting adjourned at 6:29
p.m.

Respectfully submitted,

Kayla Sander, Secretary

Quote of the Month



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

2017-2018 SLATE OF OFFICERS

President: Libby Almond

Vice President: Cindy Sippel

Secretary: Kayla Sander

Treasurer: Catherine Mulder

Past President: Jaimie
Williamson

Program Coordinator: Ann Kurtenbach

Membership: Karen Jacobson
Jan Duffy

Newsletter: Brenda O'Neill Smith

Scholarship: Cheryl Carlile
Catherine Mulder
Linda Borst

Webmaster: Margaret Munson

Submitted by: Lisa Palmersheim, Karen
Jacobson and Jan Duffy