



Accounting & Financial Women's Alliance

CONNECT • ADVANCE • LEAD

Ames Chapter

September 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

### Resident or Non-Resident?

Presented by: Michael Bootsma

Date: Wednesday, **September 20**, 2017

Time: Networking 5:30; Speaker 6:00; Dinner and Meeting 7:00

Location: **The Iowa Stater  
Gateway Hotel and Conference  
Center  
2100 Green Hills Drive  
Ames, IA 50014**

**Presenter:** Michael Bootsma, Senior Lecturer in Accounting, ISU

**Learning Objectives & Program Content:** We will discuss the substantial presence test for determining whether or not someone is a resident or nonresident for US tax purposes.

**Field of Study:** Tax

**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

With the last unofficial weekend of Summer behind us, fall is rushing in. I'm looking forward to the beautiful scenery and perfect weather, even if it also brings major allergies and the fall tax season! I hope you all have something fun to look forward to this month to enjoy the last warm days.

I've just started reading Sheryl Sandberg's *Lean In* and can hardly put it down. I know I'm late to the game as the book's been around several years, but it's the kind of book that is relevant at every life stage. If it's been on your to-do list, I encourage you to read it! And share with you my favorite quote so far: "So please ask yourself, 'what would I do if I weren't afraid?' And then go do it."

Libby

## AGENDA

1. Call to Order
2. Quorum
3. Approval of Minutes- August
4. Treasurer's Report
5. Committee Reports
  - a. Membership
  - b. Program
  - c. Bulletin

- d. Scholarship
- e. Social Media
6. Old Business
7. New Business
8. Announcements
9. Adjournment

## ATTENTION MEMBERS!!!

For any member bringing a FIRST TIME guest, Membership will pay \$10 toward each meal (\$10 for you and \$10 for your guest). What a deal! Bring a guest and help us build our membership in the Chapter. If you bring a different first time guest each meeting, you will get \$10 off each time.

## NETWORKING LUNCHEON

Networking Lunch	Meeting Date	Restaurant	Location
Tues, 10/3	9/20	Wallaby's	2733 Stange Rd, Ames
Tues, 10/31	10/18	Hickory Park	1404 S Duff, Ames
Thurs, 11/30	11/15	Red Lobster	1100 Buckeye Ave, Ames
Fri, 12/29	12/20	Aunt Maude's	547 Main St, Ames
Fri, 1/19	None	Olde Main	316 Main St,



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		Brewing	Ames
Thurs, 3/1	2/21	Brick City Grill	2704 Stange Rd, Ames
Mon, 4/2	3/21	Mary Kay Flowers	3134 Northwood Dr, Ames
Tues, 5/1	4/18	El Azteca	2727 Stange Rd, Ames
Wed, 5/30	5/16	Stomping Grounds	303 Welch Ave, Ames
Thurs, 6/28	6/20	The Café	2616 Northridge Pkwy, Ames

### MINUTES – August 2017

#### Call to Order:

The August Membership Meeting of the Ames Chapter #158 was called to order by President Elizabeth Almond at 7:34 p.m. on Wednesday, August 16, 2017, at The Iowa Stater in Ames, Iowa. Those in attendance were members: Ann Kurtenbach, Margaret Munson, Jan Duffy, Kayla Sander, Lisa Palmersheim, Cindy Sippel, Karen Jacobson, Catherine Mulder, and Elizabeth Almond. Guest, Amanda Moorman, visited the group for the CPE presentation.

A quorum was present.

#### Minutes:

Cindy Sippel moved that the minutes of the June meeting be approved as published in the August bulletin. The motion was seconded by Karen Jacobson. Motion carried.

Cindy Sippel moved that the minutes of the July planning meeting be approved as published in the

August bulletin. The motion was seconded by Karen Jacobson. Motion carried.

#### Treasurer's Report:

Catherine Mulder presented the Treasurer's Report. The June and July reports were handed out. The balance in the General Account as of June 30, 2017, is \$7,042.93. The balance in the Scholarship Account as of June 30, 2017, is \$3,774.84 with an unrestricted balance of \$1,174.84.

The balance in the General Account as of July 31, 2017, is \$7,043.22. The balance in the Scholarship Account as of July 31, 2017, is \$3,775.08 with an unrestricted balance of \$1,175.08.

The reports will be placed on file for review.

Catherine Mulder proposed the 2017-2018 Budget.

Jan Duffy moved to approve the proposed budget with the amendment to change membership expense to \$300. The motion was seconded by Margaret Munson. Motion carried.

#### Committee Reports:

##### A. Membership:

1. Karen Jacobson reported that we currently have 19 active members.
2. In order to encourage our current membership to bring guests, membership has developed an incentive plan in which members will receive \$10 off their own meal and guests will receive \$10 of their meal. This reward can only be used once per guest. The money will come from the \$300 budgeted for membership expense.



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3. Karen Jacobson and Jan Duffy plan to attend the social media committee meeting to help brainstorm about how social media can be used to attract new members.
  4. Karen Jacobson and Jan Duffy also plan to compile a list of local accounting firms so that they can send marketing materials inviting guests. Their goal is to have the invite out for the September meeting.
  5. Margaret offered to help compile a list of emails of the Des Moines chapter members from the National site so that they can be added to our listserve as a separate group.
  6. Elizabeth Almond recognized Catherine Mulder on her 25 year anniversary with AFWA. Catherine was awarded a 25 year pin and certificate.
- B. Program:
1. The upcoming program duties/plans are as follows:  
**September** – (Libby) Mike Bootsma, ISU – VITA – The Iowa Stater  
**October** – Joint meeting w/ DSM Chapter – Ron Dieter – Economics of College Sports – Library in Ankeny – catered by Tasteful Dinners  
**November** – (Jan & Kayla) – Joint meeting w/ ISU students - New CPA Exam – ISU Campus  
**December** – Holiday Party  
**January** – No meeting  
**February** – (Karen) Dr. Diane Janvrin  
**March** – (Catherine Mulder) Real Estate

**April** – (Margaret Munson) Dr. Bill Dilla –Bitcoin

**May**

**June**

**July** – Planning Meeting

C. Bulletin:

1. Karen Jacobson will submit a write-up about the \$10 discount deal for inviting guests to be sent out with the bulletin.

D. Scholarship:

1. Catherine Mulder sent the scholarships funds to Iowa State University
2. Catherine Mulder reported that the scholarship donations from the planning meeting will be represented in the August treasurer's report.

E. Social Media

1. The committee will be Tuesday, August 22<sup>nd</sup>. Lisa Palmersheim extended an invitation to the membership committee to attend as previously discussed.

New Business:

A. Delegates for AFWA Annual Meeting

1. Chapter delegates are no longer used for voting at the annual meeting. Elizabeth Almond will get clarification on how voting now works. Karen will send along the info she has already obtained on this issue.

Announcements:

- A. The CPE is all up to date and has been approved by National. Thank you Ann!



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B. Elizabeth Almond commented on how useful and awesome our chapter website is. All agreed! Thank you Margaret!

C. Lisa Palmersheim accepted a new position at John Deere in Debt and Derivative Accounting. Congratulations Lisa!

Adjournment: Meeting adjourned at 8:23 p.m.

Respectfully submitted,

Kayla Sander, Secretary

## Quote of the Month

**“We are all different, which is great because we are all unique. Without diversity life would be very boring.”**

— *Catherine Pulsifer*

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

## 2017-2018 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