



Accounting & Financial Women's Alliance

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Ames Chapter

May 2018

Ames Chapter #158

# THE SPOKESWOMAN

## Websites

National: <http://www.afwa.org>

Local: <http://amesafwa.org>

LinkedIn: <https://www.linkedin.com/groups/13567139>

## 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 Reform: The Impact on Business and You Personally"

Presented by: Rob Poterucha,

Date: Wednesday, May 16, 2018

Time: 5:30 Networking

6:00 Program

7:00 Dinner

Location: The Iowa Stater

Gateway Hotel and Conference Center  
2100 Green Hills Drive  
Ames, IA 50014

**Presenter:** Rob Poterucha is a Senior Accountant with McGowen, Hurst, Clark & Smith in West Des Moines. Rob's primary focus is tax compliance with an emphasis on multi-state taxation. In addition, Rob is leading MHC&S in its Tax Reform efforts.

Rob graduated from Iowa State in 2013 and worked at KPMG until September 2017. Rob is originally from Rochester, MN and now lives in Des Moines with his wife, Audra.

### Learning Objectives & Program Content:

This presentation will focus on the new tax bill and how it will affect businesses as well as individuals. Specifically, the presentation will go into detail on five topics: Tax Rates, General Provisions, Pass-Through Taxation, Iowa Tax Considerations and Individual Taxation. There will be examples to illustrate the various changes and how they could benefit your business or you as an individual.

**Field of Study:** Taxation

**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).



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### 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)

### PRESIDENT'S MESSAGE

Happy Spring! I hope you've been enjoying some time outdoors now that winter has finally ended. In my house, the dog is most excited as her wild attitude really belongs outside; it was an especially long winter for her.

AFWA has implemented a nation-wide Chapter Membership Challenge in order to grow our organization with a goal of having 2,020 members by 2020. This is exciting for our chapter because it aligns with our membership goals! Each chapter is given periodic growth goals with incentives for reaching these milestones. AFWA HQ and the National Membership Committee will

have webinars, guides, and other resources available for us to use throughout this campaign. We will discuss this more at the meeting next week. I'm excited to work on our membership!

Hope to see you all soon,  
Libby

Libby will be sending out links for possible projector and portable screen purchases. Please watch your email and check them out! We will discuss at the chapter meeting on May 16th.

### 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
  - f. Webmaster
6. Old Business
  - a. Technology Purchases
7. New Business
  - a. 2018 National Membership Challenge
8. Announcements
9. Adjournment



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## NETWORKING LUNCHEON

| Networking Lunch | Meeting Date | Restaurant       | Location                   |
|------------------|--------------|------------------|----------------------------|
| Wed, 5/30        | 5/16         | Stomping Grounds | 303 Welch Ave, Ames        |
| Thurs, 6/28      | 6/20         | The Café         | 2616 Northridge Pkwy, Ames |

## AFWA 2018 Referral Program

Don't forget about AFWA's membership referral program. When you refer a contact to AFWA, a national volunteer will send a personalized message to that individual, sharing with her the benefits of membership and inviting her to join. The more your colleague gets to know our members and the more she knows she's appreciated, the more likely she is to join our incredible network.

## MINUTES – April 2018

### Call to Order:

The April Membership Meeting of the Ames Chapter #158 was called to order by President Elizabeth Almond at 7:03 p.m. on Wednesday, April 18, 2018, at The Iowa Stater in Ames, Iowa. Those in attendance were members Ann Kurtenbach, Margaret Munson, Jan Duffy, Kayla Sander, Cindy Sippel, Karen Jacobson, Cheryl Carlile, Catherine Mulder, and Elizabeth Almond.

A quorum was present.

### Minutes:

Cindy Sippel moved that the minutes of the February meeting be approved as presented in the April bulletin. The motion was seconded by Catherine Mulder. Motion carried.

### Treasurer's Report:

Catherine Mulder presented the Treasurer's Report. The February and March reports were handed out.

The balance in the General Account as of February 28, 2018, is \$7,041.38. The balance in the Scholarship Account as of February 28, 2018, is \$5,616.43 with an unrestricted balance of \$2,516.43.

The balance in the General Account as of March 31, 2018, is \$7,041.67. The balance in the Scholarship Account as of March 31, 2018, is \$5,616.66 with an unrestricted balance of \$2,516.66.

The reports will be placed on file for review.

### Committee Reports:

#### A. Membership:

1. Karen Jacobson reported that we currently have 20 active members.

#### B. Program:

1. The upcoming program duties/plans are as follows:

May – (Anne Kurtenbach) Rob Poterucha – Tax Reform @ The Iowa Stater



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June - (Margaret Munson) Dr. Bill Dilla –Bitcoin  
@ The Iowa Stater  
July – Planning Meeting

C. Bulletin:

1. Margaret Munson updated the 2018 bulletins to reflect the 2018 year and reposted to the website.

D. Scholarship:

1. Cheryl Carlile, Catherine Mulder, and Linda Borst reported that there was one applicant for the Kathleen M Strum Memorial Scholarship, but that the applicant did not meet the scholarship qualifications. Karen Jacobson will relay the outcome to Penny Strum.

As a follow up, Margaret Munson suggested that we work on the clarity of the information requested in the scholarship application form. It was suggested that we add the items of “current employer” and “# of hours worked per week” to the application. The membership was in agreement that this would be a positive update to the application form.

2. Cheryl Carlile, Catherine Mulder, and Linda Borst reported that there was one applicant for the Beverly M. Wandling Memorial Scholarship, and the committee made the recommendation to award Alyson Knutsen a \$1,000 scholarship based on the range listed in the scholarship application form.

Jan Duffy moved to award Alyson Knutsen a \$1,500 scholarship. The motion was seconded by Karen Jacobson. Motion carried.

The scholarship committee will invite Alyson to join us at the May meeting.

E. Social Media

1. No report

F. Webmaster

1. No report

Old Business:

A. Announcements from External Businesses

1. Elizabeth Almond reported that she has reached out to national on this, but she has not received an answer.

B. Chapter Coach Program

1. Elizabeth Almond reported that she has submitted our questions via an online form, but she has not received an answer. She is assuming there is a delay caused by finding coaches to start responding to the online forms.

C. 2018-2019 Nominating Committee

1. Jaimie Williamson, Margaret Munson, and Karen Jacobson worked diligently to present the proposed 2018-2019 slate of officers in the April bulletin and in an extra email to the chapter membership. The proposed 2018-2019 slate of officers is as follows:

President: Cindy Sippel

Vice President: Kate Mulder

Secretary: Karen Jacobson

Treasurer: Lisa Palmersheim

Past President: Libby Almond

Publicity Chair: Lisa Palmersheim with Kayla Sander, Libby Almond, Margaret Munson



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Membership Chair: Margaret Munson with  
Kristen Krausman  
Program: Kayla Sander  
Program Coordinator: Ann Kurtenbach  
Newsletter: Jaimie Williamson  
Scholarship Chair: Lisa Palmersheim with Ann  
Clem, Carla Danielson  
Webmaster: Margaret Munson

Cindy Sippel moved to accept the 2018-2019  
slate of officers as presented. The motion was  
seconded by Jan Duffy. Motion carried.

## New Business:

A. Technology Purchases  
1. Elizabeth Almond suggested that the  
chapter purchase a projector and screen. There  
was unanimous support for the idea. It was  
discussed among the group and decided that  
Elizabeth Almond would present the  
membership with three alternatives along with a  
final recommendation at the next meeting.

## Announcements:

A. Cindy Sippel requested volunteers to  
serve on the Member of the Year Award  
Committee. Jan Duffy and Catherine Mulder  
volunteered to serve with Cindy. Cindy will  
send out an email to membership with a request  
for nominations for the award.

Adjournment: Meeting adjourned at 7:54 p.m.

Respectfully submitted,  
Kayla Sander, Secretary

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  
Publicity Chair : Lisa Palmersheim  
Membership: Karen Jacobson  
Jan Duffy  
Newsletter: Brenda O'Neill Smith  
Scholarship: Cheryl Carlile  
Catherine Mulder  
Linda Borst  
Webmaster: Margaret Munson

## Quote of the Month

"Some old-fashioned things like fresh air  
and sunshine are hard to beat."

- Laura Ingalls Wilder