



Accounting & Financial Women's Alliance

CONNECT • ADVANCE • LEAD

Ames Chapter

October 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.*

### SPECIAL NOTE

It's October. Do you know where your nametag is? Please remember to wear it to the joint meeting in Ankeny October 16. If you don't have a nametag, or can't find it, please let the membership committee know how you'd like your name to appear and we'll order one. Email [membership@amesafwa.org](mailto:membership@amesafwa.org)

### MEETING INFORMATION

Joint Meeting with the Des Moines AFWA Chapter

## "From CPA to CEO: An Entrepreneur's Journey"

Presented by: Katie Fergus, CPA

Date: Tuesday, October 16, 2018

Time: 5:30 p.m. to 7:30 p.m.

Location: Old Chicago  
2732 SE Delaware Ave  
Ankeny, IA

Cost: \$15 members and first time guests  
\$25 recurring non-members  
Payment via cash or check will be due at the event/payable to AFWA.

**Presenter:** Katie Fergus, CPA has been immersed in accounting and finance issues related to the healthcare industry for over sixteen years. She specializes in revenue cycle management and provider reimbursement. As the owner of PractiSynergy, Katie wants to partner with independent healthcare providers to collect what has been earned to keep the provider's focus on the patient.

**Program Level:** Basic

**Program Prerequisites/Advance**

**Preparation:** None

**Instructional Delivery Method:** Group Live

**Recommended Amount of CPE Credit:** 1 credit hour

**Administrative Policies:** Please register through the Des Moines Chapter website <http://www.desmoinesafwa.org/meetings> RSVP is due by noon on Friday, October 12<sup>th</sup> if you will be attending. If you must change your reservation, please contact Jen Nokes and Carrie Dostal. Reservations canceled within two business days of the meeting may result in a charge from the venue, which must be paid by the member or guest.



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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. Website: [www.nasba.org](http://www.nasba.org)

### PRESIDENT'S MESSAGE

October is here in full force. Fall decorations are all over the place and we have finally had some cooler fall weather.

For those of us with reporting and/or tax duties, deadlines are fast approaching. Fall is my favorite time of year. The only bad thing is that means winter is around the corner but I will enjoy fall while it is here.

October is always the month of our joint meeting with the Des Moines chapter. This year the Des Moines chapter is hosting so it will be on Tuesday, October 16 rather than our usual Wednesday meeting. This is a great opportunity to network with another chapter and get some CPE. It looks like they have an interesting speaker lined up.

October is also the month of AFWA's Women who Count National Conference.

Thank you in advance to our members who will be attending. For a small chapter, we always have a presence at the national conference and this year it is in driving distance in Kansas City! I wish I could attend. The conference is an excellent source of CPE and networking.

Hope to see you at Old Chicago in Ankeny on the 16<sup>th</sup>.

Cindy

### MINUTES – September 2018

Ames Chapter #158  
Accounting & Financial Women's Alliance  
Membership Meeting Minutes  
September 19, 2018

#### Call to Order:

The September Membership Meeting of the Ames Chapter #158 was called to order by President Cindy Sippel at 7:27 pm on Wednesday, September 19, 2018, at The Iowa Stater Restaurant, Gateway Hotel & Conference Center, 2100 Green Hills Drive, Ames, Iowa. Those in attendance were members Ann Kurtenbach, Margaret Munson, Lisa Palmersheim, Karen Jacobson, Cindy Sippel, Kayla Sander, Kate Mulder and Kristen Krausman. A quorum was present.



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### Approval of Minutes:

On motion made by Ann, seconded by Margaret, motion carried that the minutes of the August meeting be approved as presented in the September bulletin.

### Treasurer's Report:

Lisa presented the August Treasurer's report. As of August 31, 2018, the checking account had \$6,595.55 and the scholarship savings account had \$5,067.86 (with restricted funds of \$3,100 for the Kathy Strum Memorial Scholarship). Lisa checked with US Bank about why we could not deposit funds through the ATM and found out the ATM card was expired. She will take care of getting a new one. The report will be placed on file for review.

### Committee Reports:

Membership - Margaret reported that we have 20 members. Kristen is working with National regarding Corporate Membership for Workiva. She has at least 5 people from Workiva who are interested. The next Networking Luncheon will be held at Wallaby's on October 11, 2018. Cindy has the bag of name tags.

Program – Kayla handed out a schedule of programs for the year. Our next meeting is the joint meeting with the Des Moines Chapter hosting. The meeting will be on Tuesday, October 16, 2018 at Old Chicago Pizza in Ankeny, from 5:30-7:30 pm. The speaker will be Katie Fergus, CPA, who will

speaking on “From CPA to CEO: An Entrepreneur's Journey.” The only meeting which is not finalized is the speaker for the June meeting. Kristen will host the February meeting at Workiva with the meal catered by their firm. Margaret will update the website with this information and someone will put it on LinkedIn.

Bulletin – Cindy reported that Jaimie sends her requests for information out early so that she can send the bulletin one week before the meeting.

Scholarship – It was noted that our scholarship winner Alyson Knutsen was presented her certificate prior to the speaker tonight as she had class during the meeting. The Committee will update the scholarship application for the upcoming scholarship period.

Publicity – Kayla is working with our scholarship winner on LinkedIn. Someone is needed to keep it active.

Webmaster – Margaret will update the website for meetings and speakers.

### Old Business:

All receipts for expenses should be turned into Lisa for reimbursement.

### New Business:

Currently Kate, Kayla and Karen are planning to attend the AFWA National Conference in Kansas City from October 28th-30th. On motion made by Karen, seconded by Kate, motion carried that the Chapter donate \$300 (as approved in the



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budget) to The Foundation of AFWA at the Annual Meeting. Karen was given the check by Lisa.

### Announcements:

Remember to register for the Joint Meeting with Des Moines on their chapter website by noon on Friday, October 12<sup>th</sup>.

Kayla announced that she is expecting their third child in March. This makes three members who are expecting as Lisa and Jaimie are both due in early November. Congratulations, everyone!

### Adjournment:

Meeting adjourned at 7:57 pm.

Respectfully submitted,

Karen E. Jacobson  
Secretary

## NETWORKING LUNCHEON

Networking Lunch	Meeting Date	Restaurant	Location
Thurs, 10/11	16-Oct	Wallaby's	2733 Stange Rd, Ames
Tues, 11/27	14-Nov	Olde Main Brewing	316 Main St, Ames
Fri, 12/14	19-Dec	Aunt Maude's	547 Main St, Ames
Wed, 1/16	None	Provisions Lot F	2400 N Loop Dr, Ames
Thurs, 2/7	20-Feb	Applebees	105 Chestnut St, Ames
Mon, 3/11	20-Mar	Jethros	1301 Buckeye Ave, Ames
Friday, 4/26	17-Apr	Flame and Skewer	2801 Grand Ave (North Grand Mall)
Thurs, 5/30	15-May	Stomping Grounds	303 Welch Ave, Ames
Mon, 6/24	19-Jun	Café Beaudelaire	2504 Lincoln Way, Ames



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### 2018-2019 OFFICERS

President: Cindy Sippel  
Vice President: Catherine Mulder  
Secretary: Karen Jacobson  
Treasurer: Lisa Palmersheim  
Past President: Elizabeth Almond  
Program : Kayla Sander  
Program Coordinator: Ann Kurtenbach  
Publicity: Lisa Palmersheim, chair  
Kayla Sander  
Elizabeth Almond  
Margaret Munson  
Membership: Margaret Munson, chair  
Kristen Krausman  
Newsletter: Jaimie Williamson  
Scholarship: Lisa Palmersheim, chair  
Anne Clem  
Carla Danielson  
Webmaster: Margaret Munson

### Quote of the Month

“Some failure in life is inevitable. It is impossible to live without failing at something, unless you live so cautiously that you might as well not have lived at all- in which case, you fail by default.”  
- J.K. Rowling

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