



Accounting & Financial Women's Alliance

CONNECT • ADVANCE • LEAD

Ames Chapter

November 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 and the Impact on Entity Choice”

Presented by: Libby Almond

Date: Wednesday, November 14, 2018

Time: 5:30 Networking
6:00 Program
7:00 Dinner

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

Presenter: Libby Almond is a Supervisor of Lead Tax Services at RSM. She provides Federal and State income tax compliance for a variety of middle market businesses in the construction and non-profit industries. She has also worked extensively providing gift and estate tax compliance for high net worth individuals. Libby has three years of

experience working with clients in these areas.

Learning Objectives & Program Content:

This program will highlight a variety of changes within the Tax Cuts and Jobs Act that influence a business's choice of entity. We will discuss the tax rate change, the 199A deduction, and other factors of an entity choice analysis.

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. 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.



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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

PRESIDENT'S MESSAGE

Happy Thanksgiving! Thank you to all of our members who attended the joint meeting with the Des Moines chapter. We had a great turn out.

November is a good time to stop and reflect on the blessings in our lives. I count all of you among those blessings. I have been a member of AFWA for more than 25 years and some of my closest friends are members of this chapter. We have seen each other through many happy times and some very difficult times. We know that we can count on each other to help us through anything.

Thank you all for being an important part of my life. I look forward to sharing more good times in the future. Don't forget that we are

meeting a week early in November, on the 15th. See you then!

Cindy

AGENDA

1. Call to Order
2. Quorum
3. Approval of Minutes (September)
4. Treasurer's Report
5. Committee Reports
 - a. Membership
 - b. Program
 - c. Bulletin
 - d. Scholarship
 - e. Publicity
 - f. Webmaster
6. Old Business
7. New Business
 - a. Christmas Party
8. Announcements
9. Adjournment

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



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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.

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 speak 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.



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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 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 12th.

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

Date Change for December Networking Luncheon

The Ames Chapter Networking Luncheon has been rescheduled and will now be held on December 11, 2018, at Aunt Maude's. Please mark your calendars with the new date. We hope to see you all at the conference at ISU on the original luncheon date.

| Networking Lunch | Meeting Date | Restaurant | Location |
|------------------|--------------|-------------------|-----------------------------------|
| Tues, 11/27 | 14-Nov | Olde Main Brewing | 316 Main St, Ames |
| Fri, 12/11 | 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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ANNOUNCEMENTS

Congratulations to Lisa Palmersheim and family on the birth of their baby boy Kyler Thomas Palmersheim. Kyler was born on November 3rd at 11:11 a.m. Kyler weighed 9 lbs 14 oz and was 20 $\frac{3}{4}$ in long. He joins big brother Colton and big sister Kayla.

Congratulations to Jaimie Williamson and family on the birth of their baby girl Mia Rae Weigle. Mia was born on October 29th at 7:06 a.m. Mia weighed 6 lbs 12 oz and was 18 $\frac{1}{2}$ in long.

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

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

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