



September 2019

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

“Medicare and Medicare Fraud”

Date: Tuesday, September 10, 2019

Time: 5:30 p.m Networking
6:00 p.m. Program
7:00 p.m. Dinner

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

Presenter: Dayle Nickerson

Dayle is a long-term resident of Ames, moving here in 1987 with her family.

Dayle worked at Iowa State University for 26 years; 4 years in the College of Agriculture and then in the College of Education/Human Sciences Student Services Office. The last 4 years she was Director of the Office. Her role in the College was working with undergraduate students helping them navigate the University system:

overseeing academic advising, student records, Minority Student Services, and career services.

As well as working at ISU, she was a mother and homemaker and worked at 2 other colleges: Concordia College/St Paul, Minnesota, and the University of Northern Iowa.

When she retired in 2014, I discovered the SHIIP program and have been a volunteer SHIIP counselor for 5 years. It was a natural fit for her to assist clients in navigating the Medicare system after working with university students in understanding and navigating the ISU system! She also does volunteer work with her church and occasionally helps serve meals at Food at First.

Since retiring, Dayle and her husband enjoy traveling, both nationally and internationally. They have a motorhome to travel in the United States and have found that their labradoodle enjoys it as well! They have four children who live in Philadelphia, Denver and Seattle so they never run out of places to travel.

Learning Objectives & Program Content:

This program will provide an overview of:

- Coverage under each part of Medicare
- Options available under Medicare
- SHIIP services



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- Medicare Fraud

Field of Study: Human Resources

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. Website: www.nasba.org

PRESIDENT'S MESSAGE

Welcome to Fall! The weather is getting cooler, school is back in session, and football games are in full swing. While we say goodbye to summer fun, vacations, and travel, it is the time to bring some more regular schedules into our life. However, we have a change in our scheduled meetings for the year; please note this and plan accordingly in September and going forward.

Last month, the Ames AFWA Board took official action and changed our meeting night:

The Ames AFWA Chapter has changed our meeting nights due to the responses from the Member Meeting Date Survey. **The new meeting night will be the second Tuesday of each month – beginning immediately – September 10,**

2019. This appeared to be the preferred meeting night so we are looking forward to seeing more members at our meetings.

We've also got a full list of programs for the upcoming year – it's a great lineup! Thank you Kayla and Jan for getting these programs set up. Please join us September 10th for the 1st program from this schedule



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where Dayle Nickerson will talk to us about the Senior Health Insurance Information Program known as SHIP. This promises to be a program to provide you useful information.

Catherine (Kate) A. Mulder

BOARD MEETING AGENDA

1. Call to Order
2. Approval of Minutes – August 2019
3. Old Business
4. New Business
5. Announcements
6. Adjournment

MEMBERSHIP MEETING AGENDA

1. Call to Order
2. Quorum
3. Approval of Minutes – June 2019
4. Treasurer's Report
5. Committee Reports
 - a. Membership
 - b. Programs
 - c. Bulletin
 - d. Scholarship
 - e. Social Media
 - f. Webmaster
6. Old Business
 - a. Scholarship donation to The Foundation of AFWA
7. New Business

8. Announcements
9. Adjournment

MEMBERSHIP MEETING MINUTES

June 2019

Accounting and Financial Women's Alliance
Ames Chapter #158
Membership Meeting
June 19, 2019

Call to Order:

The June Membership Meeting of the Ames Chapter #158 was called to order by President Cindy Sippel at 7:18 p.m. on Wednesday, June 19, 2019, at The IowaStater in Ames, Iowa. Those in attendance were members: Ann Kurtenbach, Lisa Palmersheim, Cindy Sippel, Catherine (Kate) Mulder, Kayla Sander, Karen Jacobson and Margaret Munson. A quorum was present.

Minutes:

On a friendly motion made by Margaret, seconded by Kayla, that the original motion to approve the May minutes made by Kate, seconded by Ann, be amended to remove "for National purposes only" after Margaret Munson's name for Membership in the 2019-2020 slate of officers. Motion carried that the minutes of the May meeting as published in the June bulletin be approved as amended.



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Treasurer's Report:

Lisa presented the Treasurer's Report. The May report was handed out. The balance in the General Account as of 5/31/19 was \$6,730.82. The balance in the Scholarship Account as of 5/31/19 was \$6,619.98, with an unrestricted balance of \$1,019.98. The report will be placed on file for review.

Committee Reports:

A. Membership:

It was reported that we currently have 23 active members. Libby Almond officially transferred her membership to the Des Moines Chapter, thus reducing our quorum to seven at this time. Even with this transfer, we had a net increase in membership this year. The June Networking Lunch is at Café Beaudelaire in Campustown on June 24, 2019. The appropriate members reported on their phone calls to the new members from Workiva.

B. Program:

The July Chapter Planning Meeting will be held at Cindy's house in Ankeny on July 17, 2019, at 6:00 p.m. Please list what you are bringing for the potluck in your reservation response. Also, please bring your checkbook for donations to the Scholarship Fund.

C. Bulletin:

No report.

D. Scholarship:

Lisa reported that one of our scholarship winners (Marissa Simpson) attended last month's meeting and the other scholarship winner (Alexandra Patterson) will be attending a subsequent meeting after school resumes.

E. Publicity

Lisa reported that our Chapter FaceBook page was launched. She will do the regular postings. If anyone has anything to add to our FaceBook page, it should be sent directly to Lisa and she will post it at lunchtime. LinkedIn is still being worked on. (Note that it was suggested at the May meeting each member BRING to the Planning Meeting in July a short bio on themselves to be featured on our FaceBook page.)

F. Webmaster

Margaret reported that the domain name was renewed for 5 years at a cost of \$105.85.

Old Business:

Kate and Margaret presented the 2018-2019 Member of the Year award to both Kayla Sander and Lisa Palmersheim. Both ladies are young mothers and have three young children, including new babies. Both ladies work full-time and are extremely active in our Ames Chapter. They are succeeding in work-life balance. Congratulations and thank you to both Kayla and Lisa.



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New Business:

Cindy thanked the outgoing Board with pink roses and presented red roses to the incoming Board for installation. Members thanked Cindy for serving as President this past year.

Announcements:

None

Adjournment:

Meeting adjourned at 8:05 p.m.

Respectfully submitted,

Karen E. Jacobson

Secretary

MEMBERSHIP MEETING MINUTES

July 2019

Ames Chapter #158
Accounting & Financial Women's Alliance
Membership Meeting Minutes
July 17, 2019

Call to Order:

The July Membership Meeting of the Ames Chapter #158 was called to order by Past President Cindy Sippel at 7:20 p.m. on Wednesday, July 17, 2019, at Cindy's home at 1034 NE Aspen Circle in Ankeny, Iowa. Those in attendance were members Jan Duffy, Lisa Palmersheim, Karen Jacobson,

Kayla Sander and Cindy Sippel. A quorum was not present.

Approval of Minutes:

Since there was no quorum, there was no approval of minutes

Treasurer's Report:

No Treasurer's report was presented.

New Business:

Survey results:

- Meeting date - The results of the member meeting date survey were discussed. The second Tuesday of the month appears to be the most preferred day to meet. We discussed when we could make the change. We will plan to keep the August meeting on the old date of the third Wednesday and then discuss when we can make the change.
- Other options – We talked about not having a business meeting every month. We would also like to focus on keeping the meetings as short and efficient as possible, possibly starting the meeting before we finish dinner.
- Networking lunches have been difficult to schedule. Many have been canceled in the past year due to low participation. We will



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continue to schedule networking lunches.

Chapter Goals – Net growth of 2 members, current membership is 22 members, 6-8 hours of CPE. We discussed the need to get members more involved and will try moving the meeting date to see if this is helpful.

Suggestions for Programs – Cindy shared a list of possible topics from Kate and the group also made suggestions. Our chapter is responsible for the joint meeting with Des Moines this year. The combined list of possible topics and speakers is as follows:

1. Treasurer State of Iowa – possibly for the joint meeting with Des Moines.
2. Jamie Pollard, ISU Athletic Director – another possibility for the joint meeting.
3. August – Story County Community Foundation – Sunni Kamp
4. Taxes – see if Kristy Maitre still does presentations on taxes
5. Cyndie Jeffrey or Diane Janvrin – possibly September
6. Abhi Rao - Communication
7. Rod Mumm – Danfoss, past fraud, possible tour of facilities
8. Bill Dilla
9. Family financial planning

Announcements:

AFWA National Meeting - It will be held in Orlando from October 21st-23rd.

Scholarship Fund – Members attending were asked to make their donations to the Scholarship Fund for tonight's meeting.

Adjournment:

Meeting adjourned at 8:55 p.m.

Respectfully submitted,

Cindy Sippel
Secretary

BOARD MEETING MINUTES

August 2019

Ames Chapter #158

Accounting & Financial Women's Alliance
Board Meeting Minutes

August 21, 2019

Call to Order:

The August Board Meeting of the Ames Chapter #158 was called to order by President Catherine (Kate) Mulder at 7:33 p.m. on Wednesday, August 21, 2019, at the Iowa Stater Restaurant at 2100 Green Hills Drive in Ames, Iowa. Those in attendance were members Kate Mulder, Margaret Munson, Annmarie Kurtenbach, Kayla Sander and Cindy Sippel. A quorum was present.

Agenda

Because there was not a quorum for a membership meeting, the group decided that we would conduct a Board meeting for the



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business that was needed. Kate proposed that the agenda for the Board meeting consist of 1) approve a budget for the coming year, 2) approve goals and 3) discuss the scheduled meetings for the year. Margaret made a motion to adopt the proposed agenda. Cindy seconded the motion which was approved.

Treasurer's Report and Budget:

The Treasurer's Report for June and July were presented along with a budget for the 2019-2020 year. The budget was based on prior year revenue and expenses. Since we are hosting the joint meeting with the Des Moines chapter in October, Annmarie made a motion that we amend the budget and add \$50 for the joint meeting. The motion was seconded by Margaret and was approved. Margaret then made a motion to approve the amended budget which was seconded by Annmarie. The motion passed and the amended budget was approved.

Old Business:

Chapter Goals: Cindy presented the goals that were discussed at the planning meeting: net growth of 2 members, current membership is 22 members, and 6-8 hours of CPE. Based on the current size of our chapter, we discussed that two goals seemed reasonable. Cindy moved that the goals be approved and Annmarie seconded the motion. The motion passes and the goals were approved.

Additional discussion:

We discussed the timing of the scholarship application and the difficulty that we have had getting good applicants for the scholarship.

Programs: Kayla distributed the list of the programs for the year. Jan and Kayla have secured speakers and locations for each of the meetings. The schedule is as follows:

- August – Community Foundation, Sunni Kamp
- September – SHIIP, Dale Wickerson
- October joint meeting with Des Moines – Iowa Auditor of State Update, Rob Sand
- November – Cybersecurity, Diane Janvrin
- December – Holiday party
- January – no meeting
- February – Corporate Social Responsibility, Cyndie Jeffrey
- March – Fraud, Bill Dilla
- April – Danfoss Tour and Fraud Story, Rod Mumm
- May – The ABC's of Talent Management: Advantages, Best Practices and Challenges, Deidra Schleicher
- June – Land Valuation, Mike Duffy
- July – Planning meeting

Meeting Schedule and Survey results:

- Margaret presented the membership survey results. Results included



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comments that the meetings take too long. Meeting date - the second Tuesday of the month appears to be the most preferred day to meet.

- Kayla made a motion that we moved the meeting date to the second Tuesday of the month beginning with September. Margaret seconded the motion which was approved.
- We also discussed the need to get the information out to members as soon as possible. Cindy will send the minutes of this Board meeting to Jaimie so she can distribute them. Kate will send Jaimie the information related to the change in meeting date. We will ask Jaimie to send the information out as soon as possible so members are aware of the new meeting date for September.

Announcements:

Kate presented the President's pin to Cindy and thanked her for her service to the chapter.

Adjournment:

Meeting adjourned at 8:11 p.m.

Respectfully submitted,

Cindy Sippel
Secretary

2019-2020 OFFICERS

President: Catherine (Kate) Mulder

Vice President: Margaret Munson

Secretary: Cindy Sippel

Treasurer: Lisa Palmersheim

Past President: Cindy Sippel

Program: Jan Duffy
Kayla Sander

Program Coordinator: Ann Kurtenbach

Publicity: Lisa Palmersheim

Membership: Margaret Munson

Newsletter: Jaimie Williamson

Scholarship: Anne Clem (Chair)
Cheryl Carlile
Lisa Palmersheim

Webmaster: Margaret Munson



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CHAPTER CHALLENGE ACHIEVEMENT

AFWA Headquarters sent us the following message:

I would like to congratulate you on achieving your 2019 Chapter Membership Challenge Goal! In January your chapter was given a goal to increase membership by July. Your chapter did not reach it's membership goal, but you did gain a new Corporate Member which was a part of this year's challenge.

For achieving this goal, your chapter will receive the following

- \$50 toward the attendance of a Chapter Leader at the 2019 AFWA National Conference: Your Chapter will receive a \$50 check once it is confirmed that at least one Chapter Leader will be in attendance in Orlando.
- You're invited to a private networking event with AFWA National Leadership in Orlando on Monday, October 21 at 6:30 (following the Opening Reception). Details of the location will be provided later. Any leader from your chapter in attendance at the conference may attend the networking event.

- A special ribbon for your chapter attendees' namebadges at the national conference
- Recognition on stage at the AFWA National Conference and in the 2019 Impact Report

Please feel free to share this exciting news with your Chapter. If any members are planning to join us in Orlando, but have yet to register, please share the code **SIGNMEUP2019** to earn the early bird registration discount.

QUOTE OF THE MONTH

"You can never cross the ocean until you have the courage to lose sight of the shore."
– Christopher Columbus



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NETWORKING LUNCHEON

Networking Lunch	Restaurant	Location
Wednesday, August 14 th	Mary Kay's	3134 Northwood Dr, Ames
Friday, September 27 th	Jethros	1301 Buckeye Ave, Ames
Thursday, October 17 th	Wallaby's	2733 Stange Rd, Ames
Tuesday, November 19 th	Applebees	105 Chestnut St, Ames
Monday, December 30 th	Aunt Maude's	547 Main St, Ames
Tuesday, January 21 st	Café Diem	229 Main St, Ames
Thursday, February 20	Great Harvest Bakery	502 Burnett Ave, Ames
Friday, March 27	Provisions Lot F	2400 N Loop Dr, Ames
Monday, April 27	Flame and Skewer	2801 Grand Ave (North Grand Mall)
Thursday, May 21	Stomping Grounds	303 Welch Ave, Ames
Tuesday, June 23	Café Beaudelaire	2504 Lincoln Way, Ames

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