



September 2020

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

Rewards & Challenges of Business Ownership- Not a Start-Up Anymore

Date: Tuesday, September 15, 2020

Time: 5:30 p.m. Social

6 p.m. Program

7 p.m. Business Meeting

Location: Virtual Meeting via Zoom

Presenter: Stephanie Roscoe

Stephanie L. Roscoe is co-founder and co-owner of Equipoise (EQP) Accounting. Based in Nevada, Iowa, EQP Accounting provides remote accounting services to independent insurance agencies across the country. Stephanie received her B.A. in Economics from Hamline University, and her M.B.A. from the University of Iowa Tippie College of Business. While her career includes time at Cargill, The Pillsbury Company and RBC Capital Markets, she feels that the Team at EQP is the best she has ever had the pleasure of working with. In her spare time, she enjoys staying fit, getting out on her road bike and supporting other breast

cancer survivors she has met through the John Stoddard Cancer Center and Above & Beyond Cancer groups.

Learning Objectives & Program Content:

This program will discuss some of the rewards and challenges present in a 10 year old, growing services business. Rather than discuss start up considerations, costs and requirements, we will cover the following:

- Remote services over the past 10 years vs. now, in a COVID world
- Client expectations
- Competitors
- Finding – and keeping – the right hires
- Continued growth of employees and, in turn, the business
- Maintaining a life/work balance for the benefit of all

Field of Study: Business Management & Organization

Program Level: Basic

Program Prerequisites/Advance

Preparation: None

Instructional Delivery Method: Group Virtual

Recommended Amount of CPE Credit: 1 credit hour

Administrative Policies: Please respond to the invite. 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



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information regarding administrative policies such as complaint, please contact Ames Chapter Program Coordinator, Annmarie Kurtenbach at Annmarie.kurtenbach@gmail.com

PRESIDENT'S MESSAGE

I hope you are all recovering from the weather disasters.

I was looking for a theme for my third message of the 2020-2021 year, and resilience seemed appropriate. My on-line search on the topic turned up: 7 skills, 5 pillars, 3 pillars, 3 skills, 6 domains, and more. There was even a set of the following three (sic) categories: Psychological, Emotional, Physical, and Community (obviously auditing is not one of them).

But a common thread in all these lists is connectedness. And that is where we can help each other as we deal with the challenges that keep piling on this year. I am hoping for a normal, virtual meeting in September and I hope you will all tune in.

Shout-outs from August to Kayla for working with Stephanie to schedule and reschedule, to Stephanie for her willingness to be flexible about presenting, and to Jaimie for getting the word out when our August meeting was cancelled.

I am grateful for our ability to keep trying to get together and to keep working toward our mission of support for present and potential members and friends.

Stay safe,
Margaret

JULY PLANNING MEETING MINUTES

Ames Chapter #158
Accounting & Financial Women's Alliance
Membership Meeting Minutes
July 14, 2020 and July 21, 2020

The event was held as a Zoom meeting with 9 people in attendance. The meeting was called to order by President, Margaret Munson at 6:43 pm. Those in attendance were Cheryl Carlile, Jan Duffy, Karen Jacobson, Ann Kurtenbach, Catherine (Kate) Mulder, Margaret Munson, Lisa Palmershein, Kayla Sanders, and Cindy Sippel. A quorum was present.

Minutes

Jan Duffy moved we approve the minutes of the June 2020 membership meeting as printed in the bulletin. Cindy Sippel seconded the motion and the motion was approved.

Treasurer's report

Cindy Sippel reported a balance in the general fund of \$6,765.67 and \$5,832.80 in the scholarship fund. Of the scholarship



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fund, \$3,600.00 is restricted for the Kathleen M Strum scholarship and \$1,000.00 for the current scholarship winner. The remaining balance is unrestricted. The Treasurer's report will be placed on file for review.

New Business

2020-2021 Chapter Planning

Margaret Munson reviewed the goals of the prior year:

1. Net 2 growth in membership. We did not achieve this goal, instead ended the year with a net loss of 3 members.
2. Continuing education of 6-8 hours. This goal was met with 8 CPE meetings.
3. Informal goal of increasing membership involvement. With loss of members, remaining members have been involved.

President Munson asked for suggestions of goal for the coming year. Suggested:

1. Membership growth of net 2 members.

The meeting was suspended at 6:56 pm due to weather issues.

Meeting reconvened July 21, 2020 at 6:35 pm:

The July planning meeting reconvened as a Zoom meeting with 8 people in attendance. The meeting was called back to order by President, Margaret Munson at 6:35 pm. Those in attendance were Cheryl

Carlile, Jan Duffy, Karen Jacobson, Catherine (Kate) Mulder, Margaret Munson, Lisa Palmershein, Kayla Sanders, and Cindy Sippel. A quorum was present.

Treasurer's report

Cindy Sippel presented a budget for the upcoming year with income based on 17 regular members and 2 retired members' dues. Expenses remained similar to last year with small reduction for meeting room costs. Cindy suggested we remove the October meeting cost of \$50. Karen Jacobson moved we approve the budget with Cindy's adjustment. Catherine Mulder seconded the motion. Motion passed.

New Business

2020-2021 Chapter Planning

Programs discussion and suggestions:

August – Stephanie Roscoe – Rewards & challenges of Business Ownership

September – Iowa Workforce Development – unemployment benefits during Covid

October – Des Moines chapter Joint meeting – check if we have it in person

November – Economic impact of PPP and unemployment payments – Peter Orazel

December – Holiday party

January – no meeting



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February and March – Diversity and Inclusion

- Group Discussion on selected reading

April - Danfoss tour

May – Jim Summers – Negotiating - (invite Young Professionals Group of Ames)

June –

Goals:

1. Membership growth of net 2 members.
2. Continuing education of 8 hours

Scholarship Schedule: Discussed moving scholarship to fall award rather than spring. Karen Jacobson moved we continue the scholarship as in the past and review changing it next year at our planning meeting. Cheryl Carlile seconded the motion. Motion passed.

Business Meeting Schedule: Margaret Munson opened discussion about meeting format with Covid. With Zoom meetings, do we need business meetings every month? Consensus of members was to have business meetings and continue same timing format for meetings of 5:30 pm social, 6 pm program and 7 pm business meeting.

Announcements

Margaret Munson announced the website has been transferred to Jaimie Williamson and she has already been updating it.

Adjournment

Meeting adjourned at 7:58 pm.

Respectfully submitted,

Catherine (Kate) Mulder

SEPTEMBER 2020 MEMBERSHIP MEETING AGENDA

1. Call to Order
2. Quorum (30%)
3. Approval of Minutes – July 2020
4. Treasurer's Report
5. Committee Reports
 - a. Membership
 - b. Programs
 - c. Bulletin
 - d. Scholarship
 - e. Social Media
 - f. Webmaster
6. Old Business
 - a. Membership Goal
 - b. CPE Goal
7. New Business
8. Announcements
9. Adjournment



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2020-2021 OFFICERS

President: Margaret Munson
president@amesafwa.org

Vice President: Cheryl Carlile
vice-president@amesafwa.org

Secretary: Catherine (Kate) Mulder
secretary@amesafwa.org

Treasurer: Cindy Sippel
treasurer@amesafwa.org

Past President: Catherine (Kate) Mulder
past-president@amesafwa.org

Program: Kayla Sander
programs@amesafwa.org

Program Coordinator: Ann Kurtenbach
programs@amesafwa.org

Publicity: Lisa Palmersheim
publicity@amesafwa.org

Newsletter: Jaimie Williamson
bulletin@amesafwa.org

Scholarship: Karen Jacobson
Penny Strum
Cheryl Carlile
Cindy Sippel
scholarship@amesafwa.org

Webmaster: Jaimie Williamson
webmaster@amesafwa.org

QUOTE OF THE MONTH

“Although the world is full of suffering, it is also full of the overcoming of it.”- *Helen Keller, author, lecturer, and political activist*

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