



February 2022

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

2022 Tax Update

Date: Tuesday, February 8, 2022

Time: 5:30 p.m. Networking

6:00 p.m. Program

7:00 p.m. Business Meeting

Location: Jethro's in Ames

Presenters:

- Jordan Bergman, Pyle & Associates
- Sara Bergman, Associate Teaching Professor, ISU

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 Evite by Sunday, February 6th. In your response, please note whether you will be attending in person or via Zoom/WebEx. Login instructions will

be forwarded to attendees 24 hours prior to the virtual meeting.

PRESIDENT'S MESSAGE

“Fantastic February” is upon us which means we're one month closer to Spring. Can you tell I'm ready for it? That said, it is time to assemble our nominating committee for which Margaret, as past president, is chair. She will need two volunteers to help on that committee with the slate of officers to be presented no later than March and the election of officers in April. Please review the list of Officer Responsibilities and Ames Chapter Committee Responsibilities included with this month's agenda and be thinking of which role(s) you can best serve our chapter, whether as an officer, committee member or both. We have so many committed members who have served repeatedly in most every capacity; but with only 16 members now, it will continue to take more of us repeating service in different capacities to 'keep the wheels on the bus'.

Please join us at Jethro's on the 8th for another great program – Tax Update by Jordan and Sara Bergman

Best,

Cheryl Carlile



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FEBRUARY MEMBERSHIP MEETING AGENDA

1. Call to Order
2. Quorum (30% of 16 active members=5)
3. Approval of Minutes – November 2021
4. Treasurer's Report
5. Committee Reports
 1. Membership/Publicity - Lisa
 2. Programs - Jenny
 3. Scholarship - Karen
 4. Newsletter - Jaimie
 5. Webmaster - Jaimie
6. Old Business –
 1. Dues Simplicity update
7. New Business -
 1. Nominating committee
 2. Two new potential committees to enact
 3. Special presentation
8. Announcements
 1. National Events Update
9. Adjournment

NOVEMBER MEETING MINUTES

Accounting and Financial Women's Alliance
Ames Chapter #158
Membership Meeting
November 9, 2021

The monthly membership meeting was held November 9, 2021, at **Jethro's BBQ** in Ames with eight attendees in person and one virtual attendee. The meeting was called to order by President, Cheryl Carlile at 7:42

pm. Those in attendance were Cheryl Carlile, Carla Danielson, Annmarie Kurtenbach, Catherine (Kate) Mulder, Margaret Munson, Lisa Palmersheim, Kayla Sander, Cindy Sippel, and Jenny Sturgill. A quorum was present.

Minutes

A proposed amendment to the September minutes was printed in the November bulletin. Cindy Sippel moved and Kate Mulder seconded that the September minutes be approved as amended. Motion carried.

Treasurer's report

Cindy Sippel presented the Treasurer's report. The chapter has a balance in the general fund of \$7,012.84 and \$3,983.39 in the scholarship fund. Of the scholarship fund, \$3,600.00 is restricted for the Kathleen M Strum scholarship, leaving an unrestricted balance of \$383.39 in the scholarship fund. The Treasurer's report will be placed on file for chapter inspection.

A question was asked about the timing of dues receipts from National. Cindy will look at the dues report that is available from National.

Committee Reports

Membership: Lisa Palmersheim reported that the chapter has 17 members.

Programs: Jenny Sturgill asked whether future meetings should be held at Jethro's



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BBQ in Ames. Those attending indicated the venue is fine. Jenny will reserve the room for future meetings once Jethro's opens their 2022 calendar for reservations. The speaker for February has agreed to speak. She has speakers lined up for the rest of the year but not all are committed at this time. If members have suggestions for speakers and topics, please let Jenny know.

Cindy Sippel has agreed to host the holiday party in December.

Scholarship: Cindy Sippel reported that there were no applications for the Kathleen M. Strum Memorial Scholarship. There was one fine candidate for the Beverly M. Wandling Memorial Scholarship. The scholarship committee recommends one \$1,000 scholarship be awarded to Marissa Robinson. Annmarie Kurtenbach moved and Lisa Palmersheim seconded that a \$1,000 scholarship be awarded to Marissa Robinson for spring 2022. Annmarie and Lisa accepted a friendly amendment to the motion, adding that funds be transferred from the general fund to make up the difference if the unrestricted balance in the scholarship fund is less than \$1,000 at the time funds are to be expended. Amended motion carried.

There was a silent auction fund-raiser at the November meeting. Results of the auction will be reported at the next meeting. The silent auction will supplement the normal

July/December fund-raising for the scholarships.

Old Business

- a. *National Dues Simplicity Subcommittee:* Margaret Munson reported that the subcommittee met September 22 to continue discussions about the complexities of the current chapter dues system and to look for ways to reduce complexity and confusion. The subcommittee is seeking feedback from chapters about consolidating the dues rates for some member classes. The subcommittee suggested the following groupings: 1) regular and affiliate; (2) student, associate, and retired; and (3) emeritus at \$0 for all chapters.

The Ames Chapter has three separate 2021-2022 dues amounts for the six member classes: \$20 for regular, affiliate, and associate members; \$5 for student and retired members; and \$0 for emeritus members. The article in the bulletin incorrectly reported associate dues at \$5. National has been notified that a report they issued in September 2021 is inconsistent with the dues form submitted by the chapter in December 2020 for the current year. Discussion indicated that chapter members are fine



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with the dues structure of the chapter currently.

- b. *Chapter Dues for 2021-2022:* President Carlile noted that chapter dues for the upcoming year are due at national by February 1, 2022, and this is the last regular business meeting before the due date. Kate Mulder moved and Cindy Sippel seconded that the chapter dues be the same as last year: \$20 for regular, affiliate, and associate members; \$5 for student and retired members; and \$0 for emeritus members. Motion carried.

New Business

No new business.

Announcements

Women Who Count 2021 Virtual Conference:

October 18-22. Reduced rates end October 8, 2021. Kayla Sander and Kate Mulder attended some CPE sessions. Both said sessions were worth-while.

AFWA National Business Meeting:

November 17, 2021, at 2 pm EST. Registration is open.

ISU Contemporary Issues in Accounting:

Registration is open for the in-person conference to be held December 17, 2021.

Adjournment

Meeting adjourned at 8:16 pm.

Respectfully submitted,
 Margaret Munson
 Secretary

MEETING DATES 2022

March 8, 2022
 April 12, 2022
 May 10, 2022
 June 14, 2022

QUOTE OF THE MONTH

“If life was a book; every day would be a new page, every month would be a new chapter, and every year would be a new series.”

— Elizabeth Duivenvoorde



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2021-2022 OFFICERS

- President: Cheryl Carlile
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- Vice President: Carla Danielson
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Ann Clem
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Articles and submissions to the newsletter
are welcome. Please contact bulletin@amesafwa.org