



February 2023

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 Update – 2022 Filing Year

Date: Tuesday, February 7, 2023

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

Location: Jethro's
1301 Buckeye Ave
Ames, IA 50010

Presenter: Sara and Jordan Bergman

Presenter Bio: Sara Bergman is an Associate Teaching Professor of Accounting at Iowa State University, within the Ivy College of Business. Sara teaches Financial Accounting and Tax courses. Prior to teaching at ISU, Sara was an Assistant Professor of Accounting at Central College and an Auditor with McGladrey. Sara is a licensed CPA in the state of Iowa.

Jordan Bergman is a licensed CPA in Iowa and focuses on tax compliance at Pyle & Associates in Ames. Previous to working at Pyle, Jordan worked in Financial Reporting at Athene and as an Auditor with Ernst & Young.

Sara and Jordan have three children (soon to be four!) and were members of the Iowa State University marching band. Both graduated from Iowa State University, Ivy College of Business.

Learning Objectives & Program Content:

With the individual and corporate filing period upon us, Sara and Jordan will present changes for 2022 filings, recent legislative changes in federal taxes and reminders for the 2022 tax season.

Field of Study: Tax

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 5th.



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PRESIDENT'S MESSAGE

February, the most confusing month of the year for accountants. We just finished budgeting for the end of this year, finished end of last year reports, preparing for January month end and starting February. What year is it again? This time of year I'm thinking of the new year and new goals. I'm thinking about where do I want my career to go, what are the primary responsibilities of my position, what are the strategic initiatives of my organization, how can I contribute, and then create priorities while complying with regulations and accounting rules. It's always exciting to think of what the year could bring. Sometimes it's easy to just keep doing the same routine but I've been reminding myself that change can be good. I went skiing for the first time in years and although I had a couple spills, it was such a feeling of accomplishment. I hope to have that feeling at work at the end of 2023. AFWA national is starting out 2023 with a membership drive, rewards for referrals even. Watch for more information. I'm looking forward to seeing everyone at our February meeting. Note the change to a week earlier, Feb 7th.

Carla

FEBRUARY MEMBERSHIP MEETING AGENDA

1. Call to Order
2. Quorum (30% of 16 active members=5)
3. Approval of Minutes – November 2022
4. Treasurer's Report
5. Old Business
6. Committee Reports
 - a. Membership/Publicity
 - b. Programs
 - c. Scholarship
 - d. Newsletter
 - e. Webmaster
7. New Business
8. Announcements
9. Adjournment

NOVEMBER MEETING MINUTES

Accounting and Financial Women's Alliance
Ames Chapter #158
Membership Meeting
November 15, 2022

The monthly membership meeting was held November 15, 2022, at Jethro's BBQ in Ames, Iowa, with 7 members attending in person and 3 virtually. President Carla Danielson called the meeting to order at 7:15



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pm. Members attending were Cheryl Carlile, Carla Danielson, Jan Duffy, Ann Kurtenbach, Kate Mulder, Margaret Munson, Lisa Palmersheim, Kayla Sander, Cindy Sippel, and Jenny Sturgill.

A quorum was present.

Minutes

Cindy Sippel moved and Jenny Sturgill seconded approval of the August minutes as printed in the bulletin. Motion carried. There were no business meetings in September or October.

Treasurer's report

Cheryl Carlile presented Treasurer Reports for July through October. The reports show an ending balance of \$7,055.10 in the general account. The ending balance in the scholarship account is \$6,346.77, of which \$3,600 is restricted for the Strum scholarship. The unrestricted scholarship balance is \$2,746.77. Cheryl will send corrected copies of the reports to the members after the meeting.

There was discussion of the budget proposed for the 2022-2023 year. Jan Duffy asked that approval of the budget be tabled until the scholarship discussion. Budget was tabled.

Old Business

Member of the Year: The member of the year committee presented awards to Jenny Sturgill and Margaret Munson.

Committee Reports

Membership: Kate Mulder presented the following report on behalf of the membership committee:

“Since Sept networking event cancelled due to lack of participation, committee met and discussed other options. The Lunch and Learn was determined to be a good idea as an interesting draw as I was seeing questions about Iowa Individual Tax Law changes on the Iowa Society of CPA forum. We determined we could provide a free lunch within our budget using a free room at the Ames Public Library. While we designed the notices to say limit of 40 RSVPs, we have to have our meeting “open to the public” which means we allow anyone in the library that is interested to attend. The contact at the library said they seldom have many or even any additional people join a public meeting.

Actions taken to date:

- Kurt Koneck has been confirmed as speaker
- Ames Library – reserved Danfoss Room (capacity 60) from 10 am to 2 pm 11/29/2022
- Hy-Vee contacted to provide Sandwich Bar (meat & Cheese tray w/buns, chips, mixed



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fresh fruit & cookies (\$11/person)). They will deliver to Ames Library. Cheryl has arranged payment.

- Committee will provide bottled water
- About 70 postcard notices have been sent to ISCPA members in the Boone, Story, and Marshall County areas.
- Email blast sent out to the same people receiving Sept. networking email
- Notices posted on LinkedIn and Facebook
- Budgeted \$700 for event:
 - \$100 Postcards & stamps (about 100 @ \$1/ea)
 - \$550 Food (50 meals @ \$11/ea)
 - \$ 15 Food delivery
 - \$ 35 Misc.

Follow up to be done:

- Prior to event, ask each chapter member to visit in person with one individual inviting them to event.
- At event, Chapter members need to wear your nametags, develop an “elevator speech” about the value of membership, and be prepared to quote membership costs.
- News release to local papers (Ames, Marshalltown, Story City, Boone)
- Additional notices to be posted on ISCPA forum, LinkedIn, and Facebook
- Get bio on Kurt K for introduction and Ann’s CPE reporting
- On 11/25/2022
 - Confirm # of meals with Hy-Vee

- Let Ann K know # of reservations to prepare CPE sheets
- Prepare AFWA handouts
- Prepare sign-in sheet
- Prepare name tags
- After event:
 - Email PowerPoint to those requesting CPE
 - Thank you note to Kurt Koneck
 - Membership prospects – personal follow-ups”

Programs: Jenny Sturgill asked that the February and March meeting dates be changed for the convenience of presenters and members. New dates are February 7, 2023, and March 7, 2023.

Scholarship: Jan Duffy reported that the scholarship committee had several excellent applicants for the Wandling and Strum scholarships. The committee recommended that four applicants be awarded the Wandling scholarship and one applicant be awarded the Strum scholarship. The committee also recommended that \$1,500 be transferred from the Chapter’s general fund to the scholarship account to make the recommended Wandling scholarships.

Kayla Sander moved that the Chapter budget be removed from the table and approved incorporating the scholarship committee recommendation to transfer \$1,500 in funds from the general fund to the scholarship



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committee. Cindy Sippel seconded the motion regarding the budget. A question was raised about the ending balance in the unrestricted scholarship fund after this year's scholarships are awarded and it was recognized that it could be as low as zero.

(Ann Kurtenbach left the meeting. A quorum was still present.)

Motion to approve the revised budget including the funds transfer was approved.

Cheryl Carlile moved and Cindy Sippel seconded approval of the scholarship committee's recommendation to award Wandling scholarships as follows: Frances Jackson -- \$1,500; Jillian Haver -- \$1,000; Kylie Tjernagel -- \$1,000; and Eleanor Braksiek -- \$1,000. Motion carried. Cindy Sippel moved and Kate Mulder seconded approval of the scholarship committee's recommendation to award a Strum scholarship in the amount of \$1,500 to Breanne Virdan, a working mother of three. Motion carried.

All scholarship recipients are accounting students at Iowa State.

Newsletter: No report.

Webmaster: No report.

New Business

Cindy Sippel invited members to a Chapter holiday party at her home on December

13. There will be a pot luck dinner featuring Cindy's chicken and noodles and a white elephant gift exchange. Contributions will be collected for the scholarship fund.

Announcements

Cindy Sippel announced that the November networking luncheon is cancelled.

Kayla Sander announced that early bird pricing for ISU's Contemporary Issues in Accounting Conference ends on November 18. The conference is in person on December 16, 2022.

Adjournment

Meeting adjourned at 8:24 pm.

Respectfully submitted,
Margaret Munson, Secretary

NETWORKING LUNCH SCHEDULE

Date	Restaurant	Location
2/28/2023	Applebees	105 Chestnut St, Ames
3/30/2023	Dublin Bay	320 S 16th St, Ames
4/25/2023	Old Chicago	1610 S Kellogg Ave, Ames
5/25/2023	Brick City Grill	2640 Stange Rd, Ames
6/28/2023	Provisions Lot F	2400 N Loop Dr, Ames



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2022-2023 OFFICERS

President: Carla Danielson
president@amesafwa.org

Vice President: Lisa Palmersheim
vice-president@amesafwa.org

Secretary: Margaret Munson
secretary@amesafwa.org

Treasurer: Cheryl Carlile
treasurer@amesafwa.org

Past President: Cheryl Carlile
past-president@amesafwa.org

Program: Kayla Sander
Jenny Sturgill
programs@amesafwa.org

Program Coordinator: Ann Kurtenbach
programs@amesafwa.org

Program Setup: Cheryl Carlile

Membership & Publicity: Kate Mulder, Chair
Jan Duffy
Karen Jacobson
Cindy Sippel
membership@amesafwa.org
publicity@amesafwa.org

Newsletter: Jaimie Williamson
bulletin@amesafwa.org

Scholarship: Jan Duffy, Chair
Karen Jacobson
Cheryl Carlile
scholarship@amesafwa.org

QUOTE OF THE MONTH

"Some people dream of success, while other people get up every morning and make it happen."

-- Wayne Huizenga

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