

Websites

National: <http://www.aswa.org>

Local: <http://amesaswa.org>

AMES CHAPTER OFFICERS

President : Ann Kurtenbach
Email: president@amesaswa.org
Vice President: Theresa Samson
Email: vice-president@amesaswa.org
Secretary: Lisa Lembke
Email: secretary@amesaswa.org
Treasurer: Dominique Bryant
Email: treasurer@amesaswa.org
Past President Pat Jenkins
Email: past-president@amesaswa.org
Membership: Karen Jacobson
Carla Danielson
Email: membership@amesaswa.org
Newsletter: Mary Mosiman
Email: bulletin@amesaswa.org
Program: Donna Gladon
Mary Mosiman
Email: programs@amesaswa.org
Scholarship: Cheryl Carlile
Dominique Bryant
Janet Mortvedt
Email: scholarship@amesaswa.org

MISSION STATEMENT

To enable women in all accounting and related fields to achieve their full personal, professional and economic potential and to contribute to the future development of their profession.

PRESIDENT'S MESSAGE

President's Message

January is such a busy time for accountants...software updates, payroll reports, W2s, 1099s, mid-year truing up accounts, and December financials...in addition to playing catch up after the holidays. I am glad our fiscal year ends in June! My office is in high gear and I tacked up an aurora borealis calendar by the copy machine so we have something pretty to look at during this stressful time.

The 5th Annual Contemporary Issues in Accounting Conference at Iowa State in December was informative and enjoyable. Those of you needing hours next year (and even if you do not) should consider attending. ISU does a nice job with this conference and I have attended all five. They provide free parking and a very nice lunch. Thank you, Jan! An added bonus is that you get to talk with fellow ASWA members during the breaks and during lunch.

I would like to thank those of you who volunteered your time to wrap gifts at the mall. I will try and get the preliminary figures from Donna before our meeting. See you on the 16th!

Ann

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MEETING INFORMATION

Date: Wed., January 16th
Time: 5:30 PM Social Time
6:00 PM Speaker
7:00 PM Dinner/Meeting
Topic: 2007 IRS Update
Location: Buford's Restaurant
Quality Inn
2601 E 13th Street, Ames
RSVP: Donna Gladon
please RSVP by Tues noon 1/15
515-233-6554 or donnagladon@yahoo.com

AGENDA

**Agenda
American Society of Women Accountants
Ames Chapter #158
January 16, 2008**

1. Call to Order
2. Quorum
3. Approval of November Minutes
4. Treasurer's Report
 - a. Monthly Report
 - b. 2007-2008 Budget
5. Committee Reports
 - a. Membership
 - b. Program
 - c. Bulletin
 - d. Scholarship
6. Old Business
 - a. Mall Gift Wrapping
7. New Business
 - a. Discussion of 2008-2009
Proposed Slate of ASWA
National Officers
8. Announcements
 - a. 2008 Joint National Conference
– October 28-30, Dallas, TX

- b. Next Meeting – February 20th
at Buford's, 5:30 networking,
6:00 program, 7:00 meeting
- c. Networking Lunch –
Wednesday, January 30th at
The Café, 12:00

9. Adjournment

SPEAKER INFORMATION

Kristy Maitre
Senior Stakeholder Liaison
Internal Revenue Service
Des Moines, Iowa

Kristy came to the service as a seasonal employee in the fall of 1986. Since then she has served in many positions, Management, Revenue Agent, On the Job Trainer, Instructor and after 21 years this October, she currently serves as the Senior Stakeholder Liaison of the Internal Revenue Service for Practitioners and Industry in the State of Iowa. If you are not sure where to go or who to call, she can help in most situations.

NOVEMBER 2007 MINUTES

**American Society of Women Accountants
Ames Chapter #158
Membership Meeting
November 14, 2007**

Call to Order: The November 2007 Membership Meeting of the Ames Chapter #158 was called to order by President Annmarie Kurtenbach in Ames at 6:45 pm on Wednesday, November 14, 2007. Those in attendance were Dominique Bryant, Cheryl Carlile, Carla Danielson, Jan Duffy, Donna Gladon, Annmarie Kurtenbach, Karen Jacobson, Sue Jones, Kate Mulder, Brenda O'Neal-Smith,

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Theresa Samson, and guest Xiaowen Guo. A quorum was present.

Approval of Minutes: The June minutes were changed to fix a typing error in a members name from "Penney Strum" to "Penny Strum." The September minutes were changed to fix a typing error under Announcements from "wee" to week." It was moved by Karen Jacobson and seconded by Jan Duffy that the minutes be approved as amended. Motion passed.

Treasurer's Report: Dominique Bryant presented Treasurer's reports for September and October 2007. The Treasurer's reports were placed on file for review. Ann Kurtenbach asked for discussion of the 2007/2008 budget.

- Jan Duffy made the motion to increase the amount of scholarships up to \$2,500 from \$1,200 and seconded by Teresa Samson. Cheryl Carlile moved to amend the amount for scholarships to \$2,600 and Jan Duffy seconded. Motion passed.
- Jan Duffy made the motion to change revenue from gift wrapping to \$1,200 and revenue from the education seminar to \$500 and Cheryl Carlile seconded. Motion passed.
- Karen Jacobson moved to approve the budget as discussed and Jan Duffy seconded.

Committee Reports:

Membership Committee:

- Karen Jacobson presented one application for approval by the membership: Josanne Six. Karen Jacobson made and Kate Mulder seconded a motion to accept the applications subject to approval by National. Motion carried.
- Karen Jacobson informed the group that 10 members have signed up to attend the play *A Don't Hug Me Christmas Carol* on November 30, 2007 at 7:00 pm. Dinner will be held at Aunt Maud's prior to the play and time will be announced in a future email.

- Jan Duffy reported that no members have attended the scheduled athletic events so no future dates will be set for members to attend.
- Karen Jacobson reported that there are currently 4 new members out of 8 new members needed for a free registration for a first time attendant to Nationals in October 2008.

Program: Donna Gladon announced Kristy Maitre from the Internal Revenue Service will speak at the next scheduled membership meeting. Donna is also working on getting a guest speaker to present on Estate Planning. She also asked any members who would like to be added to the standing reservation should email programs@amesaswa.org. The RSVP notification for the meeting was left out of the November 2007 newsletter.

Bulletin: Submit all information and reports for the December bulletin to Mary Mosiman.

Scholarship: Cheryl Carlile reported that the Scholarship Committee met on Tuesday, November 13, 2007 to review 17 scholarship applications. The committee presented three applications to the group. They designated \$1,000 to Jessica Pheona Victoria Green, \$1,000 to Kacy Merseal, and \$600 to Heather Scott. Jan Duffy made the motion and Carla Danielson seconded to approve the scholarship denominations as presented by the Scholarship Committee. Motion carried. The group recommended taking social security numbers off next years applications and to ask only the scholarship winners for their identification numbers in order to process their scholarship with the University.

Old Business:

- 2007 ASWA Woman of the Year recipient: Karen Jacobson was presented the women of the year award at the National Convention.
- Karen Jacobson presented to the group that the Ames Chapter #158 is the Chapter Challenge winner for Retention and Recruitment for Region 3 for 2006-2007.

ASWA

American Society of Women Accountants

Volume 2, Number 15

January, 2008

THE SPOKESWOMAN

Ames Chapter #158

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- **National Conference.** The National Conference was held in Orlando, FL on October 28th – 30th. Kate Mulder informed the group that the Amendments to the National Bylaws were passed by the majority of the delegates. The National board membership is also increasing to 18 members. Kathy Strum presented on the success of the Dress for Success campaign and \$12,000 was raised for the Education Foundation. Dominique Bryant communicated on the status of the Chapter President Council (CPC). The council will be working toward improving the communication among chapters.
- **Gift Wrapping.** Teresa Samson passed around the gift wrapping schedule for members to sign up for a time to wrap gifts at the mall. The goal is to staff 50% of the hours worked. Used boxes are also in demand and the group is encouraged to bring them to the location as needed.

New Business:

- **Holiday Potluck Party:** The holiday party will be held on December 19, 2007 at Jan Duffy's house. Jan will be providing soup and members are to bring snacks. An email will be sent in order for members to sign up for what to bring and will provide additional information.

Announcements:

Next meeting: January 16, 2008 at Buford's Restaurant.

Networking Luncheon: Monday, Nov. 26 at Penara Bread, 12:00 and Friday, Dec. 28 at Aunt Maud's, 12:00.

Adjournment: Meeting adjourned at 8:20 pm.

Respectfully submitted,

Lisa Lembke, Secretary

UPCOMING EVENTS

Networking Luncheons

RSVP to Carla Danielson by 12:00 noon the work week day before each luncheon
291-0253 or 292-6165 ext 805
carlad@ogdenbancshares.com

| Date | Location | Time |
|------------|----------------------|-------|
| Wed 1/30 | The Café | 12:00 |
| Thurs 2/28 | Olde Main Brewing Co | |
| Fri 3/28 | Dublin Bay | 12:00 |
| Tues 4/29 | Lucullan's | 12:00 |
| Thurs 5/29 | La Fuente | 12:00 |
| Mon 6/30 | Wallaby's | 12:00 |

MEMBER BIRTHDAYS

Jan 7 Kate Mulder
Jan 9 Cindy Sippel
Feb 13 Mary Mosiman
Feb 15 Karen Jacobson

Happy Birthday



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UPCOMING MEETING

Date: Wednesday, 1/16/08
Location: Buford's Restaurant, Ames
Topic: 2007 Update from IRS
Kristy Maitre, Internal Revenue Service

Date: Wednesday, 2/20/08
Location: Buford's Restaurant, Ames
Topic: Retirement Financial Planning
Kurt Maher, Financial Partners Group

Date: Wednesday, 3/19/08
Location: Buford's Restaurant, Ames

Date: Wednesday, 4/16/08
Location: Buford's Restaurant, Ames

Date: Wednesday, 5/21/08
Location: Buford's Restaurant, Ames

Date: Wednesday, 6/18/08
Location: Legend's Skybox, Ames

ADDITIONAL NEWS

**REPORT OF THE NATIONAL
NOMINATING COMMITTEE
SLATED 2008-2009 BOARD OF
DIRECTORS:**

President Elected in the spring of 2007 for a term starting July 1, 2008
Barbara W. Covington Fort Walton Beach

President-Elect To serve as National President in 2009-2010
Stacey L. Craig, CPA Phoenix

Vice Presidents
Tracy L. Johnson, CPA San Antonio
Monika P. Miles, CPA Silicon Valley
Vivian L Moller, CPA Milwaukee

Secretary
Catherine A. Mulder, CPA Ames

Treasurer
Cheryl Willers Flagstaff

Directors To serve two years, July 1, 2008 to June 30, 2010
Berranthia Brown Atlanta
Dianna Patton, CPA, CFP Richmond
Christina A. Polf, CPA Seattle
Kathryn Sharp, CPA

Member-At-Large
Gina Slack, CPA Des Moines

Immediate Past President
Karen J. Gunther Boston

Directors Serving the second year of a two-year term - elected in the spring of 2006 to serve until June 30, 2009
Gale Kreitzberg, CPA, CTFA Billings
Eleanor Siverts-Akerman, CPA Bellevue
Susan R. Tripepi Akron/Canton

Respectively submitted by the National Nominating Committee:
Dolores Lara, CPA Orange County
Wendi Taber, CPA, CISA San Antonio
Joy N. Barron (Chair) Birmingham

Recommendations for Regional Director

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During the interview process, several candidates interviewed expressed an interest in serving as a Regional Director. We recommend the following members serve as regional directors for a term ending June 30, 2009. In our confirmation letter to them, they can begin their term at any time, but no later than July 1, 2008. These Regional Directors have been asked to contact Stacey Craig, VPChapter Partnering, for their assignment.
Shirley Holt - Birmingham
Carol Mansen, CPA - Denver/San Antonio
Violeta Torres - El Paso
Dolores Lara, CPA Orange County
Wendi Taber, CPA, CISA San Antonio
Joy N. Barron (Chair) Birmingham

QUOTE OF THE MONTH

**A positive attitude may not solve
all your problems, but it will annoy
enough people to make it worth
the effort.**

-Herm Albright

Articles and submissions to the newsletter are welcome. Please contact Mary at bulletin@amesaswa.org