

Websites

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

Local: <http://amesaswa.org>

**AMES CHAPTER OFFICERS**

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Vice President: Lisa Palmersheim  
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Treasurer: Penelle Strum  
Email: [treasurer@amesaswa.org](mailto:treasurer@amesaswa.org)

Past President: Stephanie Roscoe  
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Scholarship: Cynthia Jeffrey, Chair  
Soma Mitra  
Penelle Strum, Treasurer  
Email: [scholarship@amesaswa.org](mailto: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  
March, 2011

Well, we survived winter again! At my office we've started making excuses to walk the block to the other building instead of putting it off as long as possible!

While many tax returns have already been filed, those that are left are usually more complex or may have one difficult issue left to resolve. Come to our meeting this month and get your questions answered by Kristy Maitre, Senior Stakeholder Liaison with the IRS. Bring your thorniest issues and maybe even a pet peeve or two! Maybe it's one of those things you've wondered about but it isn't worth making a phone call to get the answer. Here is your chance to talk to an IRS agent without getting put on hold for 20 minutes!

See you there!

# ASWA

American Society of Women Accountants

## THE SPOKESWOMAN

Volume 6, Number 6

March 2011

Ames Chapter #158

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Marilyn Moehlmann  
President

### AGENDA

AGENDA – March 23, 2011

1. Call to Order
2. Quorum
3. Approval of Minutes
4. Treasurer's Report
5. Committee Reports
  - a. Membership
  - b. Program
  - c. Bulletin
  - d. Scholarship
  - e. Outreach
6. Old Business
  - a. Regional Conference
  - b. Financial Literacy progress report – Karen Jacobson
7. New Business
  - a. Nominations
8. Announcements
9. Adjournment

### MEETING INFORMATION

**Date:** Wed, March 23rd 2011

**Time:** 5:30 PM Social Time  
6:00 PM Speaker  
7:00 PM Dinner

**Speaker:** Kristy Maitre

**Topic:** Tax Update

**Location:** Pazzesco Pasta and  
Chophouse

6008 W Lincolnway  
Ames, IA 50014  
[www.pazzescochophouse.com](http://www.pazzescochophouse.com)

**RSVP:** [programs@amesaswa.org](mailto:programs@amesaswa.org)

### February 2011 MINUTES

February Minutes  
American Society of Women Accountants  
Ames Chapter #158  
Membership Meeting  
February 16, 2011

Call to Order: The February Membership Meeting of the Ames Chapter #158 was called to order by President Marilyn Moehlman in Ames at 7:25 pm on Wednesday, February 16, 2011. Those in attendance were members Cheryl Carlile, Kayla Christensen, Jan Duffy, Karen Jacobson, Sue Jones, Haiyan Li, Soma Mitra, Marilyn Moehlmann, Kate Mulder, Margaret Munson, Brenda O'Neill-Smith, Lisa Palmersheim, Stephanie Roscoe, Cindy Sippel, Kathy Strum, and Penny Strum. A quorum was present.

Minutes: Cindy Sippel moved and Kate Mulder seconded that the January minutes be approved as printed in the bulletin. Motion carried.

Treasurer's Report: Penny Strum presented the treasurer's report for January. The report will be placed on file for review.

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Committee Reports

- A. Membership: Nothing to report
- B. Program: Cheryl Carlile reported that the March program will be an IRS update. Jan Duffy volunteered to present a program on leasing. Send ideas for other speakers to Cheryl and Lin Shen at [programs@amesaswa.org](mailto:programs@amesaswa.org).
- C. Bulletin: Watch email for the bulletin reminder. The March meeting will be a week later than usual on March 23 because of spring break.
- D. Scholarship: Nothing to report.
- E. Outreach: Nothing to report.

Old Business

- A. Regional Conference: Stephanie Roscoe reported that planning for the regional conference to be held in Ames July 15-16, 2011, is going well. The committee has agreement from at least one corporate sponsor. The program is filling in on schedule. There will be an on-line registration form and on-line payments will be accepted. Soma Mitra reported that several fun night ideas are being researched.

New Business:

- A. Chapter dues for the coming year will be reported to National at no change from the current rate of \$20.50.
- B. Nominating Committee: Immediate Past President Stephanie Roscoe will chair the nominating committee. Lisa Palmersheim and Karen Jacobson will serve on the committee. A report from

the committee is expected at the March meeting.

- C. Karen Jacobson and Brenda O'Neill-Smith will lead chapter efforts to present financial literacy training to local groups. FDIC has training materials for children and adults.

Announcements: None.

Adjournment: Meeting adjourned at 8:00 pm.

Respectfully submitted,  
Margaret Munson, Secretary

**Proposed Slate of Officers 2011-2012**

President: Lisa Palmersheim  
Vice President: Soma Mitra  
Secretary: Ann Kurtenbach  
Treasurer: Penelle Strum  
Past President: Marilyn Moehlmann  
Program: Kayla Christensen Co-Chair  
Program: OPEN Co-Chair  
Membership: Stephanie Fox Co-Chair  
Membership: OPEN Co-Chair  
Newsletter: Carla Danielson  
Scholarship: Jan Duffy Co-Chair  
Scholarship: Lin Shen Co-Chair  
Scholarship: Penelle Strum Treasurer

Presented by the Nominating  
Committee: Karen Jacobson  
Lisa Palmersheim  
Stephanie Roscoe

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**UPCOMING MEETINGS**

- April 20
- May 18
- June 15
- July 15-16 Regional Conference

**Networking Lunches**

Future Networking Lunches:

Tues, April 26<sup>th</sup> @ Old Chicago

Thurs, May 26<sup>th</sup> @ Wallaby's patio

**QUOTE OF THE MONTH**

"Do what you can, with what you have, where you are" – Theodore Roosevelt

Articles and submissions to the newsletter are welcome. Please contact Cindy at [bulletin@amesaswa.org](mailto:bulletin@amesaswa.org)