



Accounting & Financial Women's Alliance

CONNECT • ADVANCE • LEAD

Ames Chapter

February 2024

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

February Ames Chapter Meeting

“Tax Update – 2023 Filing Year”

Date: February 13, 2024

Time: 5:30 pm Social Hour
6:00 pm presentation/program
7:00 pm dinner served

Location:
Old Chicago
1610 S Kellogg Ave
Ames, Iowa

Presenter Bios:
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 four children 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 2023 filings, recent legislative changes in federal taxes and reminders for the 2024 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

Note that the March meeting date has been changed to Tuesday, March 5, 2024.



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PRESIDENT'S MESSAGE FOR FEBRUARY

I hope everyone's year has gotten off to a good start. It's time to make goals and plans for the year. On a personal note, my son is home after his four years in the Air Force and I hope to help him get settled back in Iowa. On the professional side, I plan to continue to work on the goals I started last year. I made progress but will continue. In addition, I want to find more ways to give back. I signed up for a new mentorship program at work and am mentoring formally for the first time. I'm excited to share what I can. I also have a new young direct report and am excited to mentor her as well. It should be a busy and rewarding year.

While making plans for the year, maybe consider putting the Women Who Count Conference Oct 23-26 and the Connect Advance Lead Conference on June 6th on your calendar. I'm looking forward to seeing everyone at the February meeting.

Carla

FEBRUARY MEMBERSHIP MEETING AGENDA

1. Call to Order
2. Quorum (30% of 19 active members=6)
3. Approval of Minutes – November 2023
4. Treasurer's Report
5. Committee Reports
 - a. Membership/Publicity
 - b. Programs
 - c. Scholarship
 - d. Newsletter
 - e. Webmaster
6. Old Business
7. New Business
 - a. 2024-2025 Nominating Committee
8. Announcements
9. Adjournment

NOVEMBER MEETING MINUTES

Accounting and Financial Women's Alliance
Ames Chapter #158
Membership Meeting
November 14, 2023

Call to Order:

The November Membership Meeting of the Ames Chapter #158 was called to order by President Carla Danielson at 7:39 p.m. on Tuesday, November 14, 2023, at Old Chicago in Ames, Iowa. Those in attendance were members Kate Mulder, Carla Danielson, Kayla Sander,



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Annmarie Kurtenbach, Margaret Munson, and Cindy Sippel. A quorum was present.

Minutes

Margaret made a motion to approve the minutes of the September 2023 membership meeting as printed in the bulletin. Kate seconded the motion that was approved.

Treasurer's Report:

Cheryl emailed the September and October financial reports. The balance in the general fund was \$5,211.28. The scholarship fund has a balance of \$3,939.50. Of this balance, \$2,350 is restricted for the Kathy Strum scholarship and the remaining balance of \$1,589.50 is available for the Beverly Wandling Memorial Scholarship. The Treasurer's Report will be placed on file for review.

Committee Reports:

Membership:

Kate noted that member retention was discussed at the annual conference and that she bought a book on membership retention. She is looking for ideas.

Programs:

Kayla gave us an update on programs: December will be the Christmas party. January – no meeting. February 13 – tax update, March 5 (note the date) – health and wellness, April – HR issues today, up and coming talent and their demands, May – looking at doing a company tour, if possible, June – Virtual AFWA national program.

Newsletter:

No report.

Scholarship:

Scholarship applications were due November 1. We received one application from Rylee McNaughton, a student at DMACC. After discussion, Kate moved and Ann seconded a motion to award a \$1,000 scholarship to Rylee McNaughton. The motion was approved.

In addition to posting the application forms on our website and sending to the colleges and universities, Kayla asked that the application forms be sent to her so she can help distribute them.

Publicity:

No report

Webmaster:

No report.

Old Business:

None.

New Business:

2023-2024 Chapter Dues

Current chapter dues are:

Regular/affiliate	\$25
Student/associate	\$10
Retired	\$10
Emeritus	\$ 0

Margaret made a motion to keep chapter dues for the upcoming year at the same amounts as the current year. Kate seconded the motion which was approved.



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Holiday Party

The Holiday Party will be on our regular meeting night of December 12 at 6:00 at Cindy Sippel's home in Ankeny. We will do a potluck dinner along with a white elephant gift exchange. Contributions will be accepted for the scholarship fund. Margaret offered to send out and evite to our member.

Announcements:

ISU will be hosting the Contemporary Issues in Accounting Conference on December 15. There will be a focus on industry presentations this year including Technology in Auditing, Lessons from Integration, economic update and Airport Finance 101.

The next networking lunch is Monday, November 27 at the Cafe.

Kayla and Kate attended the AFWA national conference in Reno. Next year's conference will be in Hilton Head, South Carolina

Adjournment:

Meeting adjourned at 8:26 p.m.

Respectfully submitted,
Cindy Sippel
Secretary

NETWORKING LUNCH SCHEDULE

Networking Lunch	Restaurant	Location
2/26/2024	Applebees	105 Chestnut St, Ames
3/25/2024	Dublin Bay	320 S. 16th St, Ames
4/22/2024	Hickory Park	1404 S Duff Ave. Ames
5/20/2024	Brick City Grill	2640 Stange Rd, Ames
6/24/2024	Provisions Lot F	2400 N Loop Dr, Ames

2023-2024 OFFICERS

President: Carla Danielson
 Vice President: Lisa Palmersheim
 Secretary: Cindy Sippel
 Treasurer: Cheryl Carlile
 Programs: Jenny Sturgill / Kayla Sander
 Program Coordinator: Ann Kurtenbach
 Scholarship: Jan Duffy, Cindy Sippel, Cheryl Carlile
 Membership/Publicity: Kate Mulder
 Past President: Cheryl Carlile
 Nominating Committee Chair: Cheryl Carlile
 Bulletin: Margaret Munson
 Webmaster: Margaret Munson

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