



Accounting & Financial Women's Alliance

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Mesa East Valley's IN TOUCH

December 2014

Vol 23, Issue 6

www.mesaeastvalleyafwa.org

President's Corner by Stacey Craig



Can you believe the holiday season is already upon us? We have some fun community service events planned for this month. We have adopted a couple of families and you should have seen some emails go out letting you know which items are needed. In addition to donations, we have an opportunity for our members to help hand out the gifts to the families this coming Saturday. I'm sure it

will be a very rewarding experience and I'm thrilled that we can do something as a chapter to help those who are less fortunate and really need our help.

Our bowling event in November was a lot of fun. We had 5 chapter members and 4 of their family members in our group. A good time was had by all, and I'm already looking forward to our next social event!

Scholarship applications are due December 15th. If you know of any students who could use a little help, please direct them to our website for more information.

This month's program is "Teambuilding," presented by my boss, Roger Gannon. He's got some great things planned for us and I know you will all enjoy his presentation. Don't forget that members receive 50% off the December meeting fee and we will be doing an optional gift exchange to celebrate the holidays. If you want to participate, please bring a wrapped gift valued at around \$25. Hope to see you there!

Stacey Craig

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*Happy Holidays to you and
your families from the Mesa
East Valley chapter of
AFWA!*

*“Remember,
This December,
That love weighs more than
gold.”*

*Josephine Dodge Daskam
Bacon*



December Meeting Details **Tuesday, December 16, 2014**

Holiday Gift Exchange!

TOPIC: Team Building
LOCATION: Landmark Restaurant
809 W Main St, Mesa
DINNER: Prime Rib or Salad Room
TIME: 5:30 p.m. Registration
6:00 p.m. Dinner
7:00 p.m. Team Building
COST: \$13 member / \$32 guest / \$10 student

RSVP online at:

<http://mesaeastvalleyafwa.org/meetings.html>

(Salad room option only after Dec 12)

You can also contact our membership director
Patricia Schumacher at pks-cpa@cox.net or call
480-583-4344

ADMINISTRATIVE POLICIES: If you would like to
cancel a reservation, please contact Patty at the above email.
Per chapter rules, if you register and do not attend or do not cancel by
the Monday prior to the meeting, you will be charged the cost of the
dinner. For more information regarding administrative policies such as

ANNOUNCEMENTS



- **Monthly 50/50 Drawing:** If you can't win the Lottery, try the 50/50 drawing for better odds (tickets \$2 each or 6 for \$10). Proceeds benefit our scholarship fund.
- **Community Service:**
 - Holiday Gift Drive:** We are collecting gifts for two families and helping ICAN to distribute gifts. If you can help with either of these, please see our Community Service page on the website or contact Dayna Brown at daynab@woodsidehomes.com. Gifts are needed for the adopted families by Dec. 8
 - Financial Literacy Program:** Our chapter is working to help others learn the financial skills that will help them manage their money and be successful in life. This program uses the FDIC Money Smart Program. If you are interested in helping, please contact Pat Donohue at Pkdonohue@cox.net
 - Heart Walk:** March 21, 2015—Sign up now to join the Number Crunchers Team! More details on our website: www.mesaeastvalleyafwa.org/heart-walk
- **Holiday Gift Exchange and meeting:** Save the date for our December meeting, which will be a week earlier than usual on December 16. Attendees should bring a gift valued at \$25 or less for the gift exchange.
- **Chapter Scholarship opportunities:** Spring semester Scholarships available from our chapter. **Application deadline is December 15, 2014.** Visit our website scholarship for more information and to apply.
- **AFWA National Conference: Save the Date!**
 - October 26-28, 2015: Pittsburgh, PAVisit the website at www.afwa.org for updates as the year goes on.

Meetings and Events around Phoenix

IMA Valley of the Sun Chapter (www.imavalleyofthesun.org):

-December Meeting: Tuesday, December 9: 4:00 pm—Dinner and Two hours CPE. One hour at 4:00 pm: “Business Apps that Can Help you at Work” and One hour at 7:00 pm: “How to Use LinkedIn more Efficiently”. Visit their website for details and to register: www.imavalleyofthesun.org

-Movie Night, Thursday, January 8: 6:30 pm—Bring your family and friends and join the IMA to watch “the Hobbit: The Battle of the Five Armies”. \$25/ticket includes movie, popcorn, drink. Proceeds go to IMA student chapters

-CMA Review crash course: This is a final review for those preparing to take the CMA exam. Part I—January 3 and Part II—January 10. \$50 per session. Please contact Travis Magneson at tmagneson@cbiz.com for more information.

AFWA Phoenix Chapter (www.phoenixafwa.org):

-December Holiday dinner and Fundraiser, Thursday, Dec. 18: 6 pm: Food, fun, and CPE! Visit their website for details and to register.

VITA opportunities: The Mesa United Way is looking for volunteers for the VITA program (Volunteer Income Tax Assistance). This program provides free income tax assistance to low and moderate income families. Training starts in November. Please contact Don Jensen at don.jensen@mesaunitedway.org for more information. This is a great way to help the community and for non-tax accountants to increase their tax knowledge.

VITA training sponsored by AFWA/IMA: One day class for accountants and others with some knowledge and/or experience with taxes. Please see flyer on Page 8.

ICAN: Positive Programs for Youth:

One of our members, Brenda Masters, is involved with Collaborating for a Cause. Please see the information below and contact her if you are interested in find out more about this organization.

Collaborating for a Cause is a networking group comprised of nonprofit finance and development professionals. The group conducts monthly meetings aimed at providing networking opportunities and expert led best practice learning experiences for our members. The atmosphere is lively and friendly, yet structured and efficient.

For information on upcoming events and ways to get involved, please contact Brenda or Danielle:

Brenda@icanaz.org or Danielle@icanaz.org





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2014 - 2015 Program Schedule

Date	Program	Speaker	Promotion	Salad Bar or Entree
7/22/14	GAAP/FASB Updates	Chris Lutes & Adam Cary		Atlantic Salmon
8/26/14	Nonprofit Accounting	Patricia Schumacher	Qtrly Food Bank	Champagne Chicken
9/23/14	Economic Update	Annie Groth	Joint meeting with Phx Chapter	Pot Roast
10/28/14	Resume Writing & Interview Skills	Julie Walker	Student Night	Crab Cakes
11/18/14	Forensic Accounting	Billy Vickers	Qtrly Food Bank 2 Hours CPE	Roasted Turkey
12/16/14	Team Building	Roger Gannon	Gift Exchange & Holiday Gift Drive ½ price member	Prime Rib
1/27/15	Federal & State Tax Updates	Lisa Novack, IRS & Anthony Forschino AZDOR	2 Hours of CPE	Chicken Marsala
2/24/15	Excel	Shelby Williams	Qtrly Food Bank Joint Meeting Scholarship Awards	Meatloaf
3/24/15	My Brain Made Me Do It: Common Investor Mistakes	George E Rambow III, Edward Jones	Bring Your Boss	Southwest Tilapia
April 2015 Fun Event - TBD				
5/26/15	Professional Image Leadership	Mary Lynn Ilitsky TBA	Qtrly Food Bank 2 Hours CPE	Champagne Chicken
6/23/15	Officer Installation	No CPE Program		Atlantic Salmon

Regular monthly meetings are held at the Landmark Restaurant 809 W. Main St. Mesa, AZ 85201. Speakers or topics may change if necessary. Please contact the chapter before the meeting date to confirm.

Cost: \$26 - Member, \$32 - Guest, \$20 - Student Reservations should be made by noon the Friday before the meeting. Any cancellations must be made by noon on the Monday before the meeting. The Mesa East Valley Chapter will be charged by the restaurant for all meals reserved. Any missed reservations will be billed by the chapter treasurer to the member or guest if they are not canceled by the deadline. To RSVP, please visit our chapter website at www.mesaeastvalleyafwa.org/meetings. To change or cancel reservations, please contact Membership Director Patricia Schumacher at pkc-cpa@cox.net.



2015 theme:

**Lightbulb Moments that Show the Way
Personal Insights In Action**

The Accounting MOVE Project measures and supports the advancement of women in public accounting. The AFWA is an association partner with MOVE.

Accounting MOVE Project 2015 Key deadlines:

- November 20, 2014: Webinar: Insights from MOVE firms
- December 22, 2014: Deadline for signing up
- January 30, 2015: Deadline for completing MOVE survey
- May 2015: MOVE executive summary in Public Accounting Report
- June 1, 2015: Best Public Accounting Firms for Women & Full MOVE report released
- June 17, 2015: Confidential firm scorecards and snapshots released

How MOVE Works

- Proven and promising practices relevant for firms of all sizes
- Career insights that provide context for individual women
- Results published in [Public Accounting Report](#) in May and [in full](#) in June
- [Best Public Accounting Firms for Women list](#) sponsored by AFWA and AWSCPA
- Comprehensive, confidential survey and interviews

- Confidential report to each participating firm
- Administrative fee scaled to firm size
- Participation and signup details:
<http://wilson-taylorassoc.com/move/accounting>

How You Can Help

- Encourage your firm or the firm(s) used by your organization to join MOVE today!
- Share your 'lightbulb' moment with the MOVE team: move@wilson-taylorassoc.com

Highlights from the 2014 Accounting MOVE Project

Women comprise:

- 51% of employees at American CPA firms
- 51% of the managers
- 44% of the senior managers
- 19% of partners/principals/leaders
- 19% of management committee members

Key takeaways:

- Firms can actually turn a profit from their women's initiative
- Rothstein Kass gained \$6.5 million in new revenue in 3 years directly from its Rainmakers Roundtable program
- The key: sync skills training with business development experience
- The most important metric to track: retention of partner-track women

For more details:

Joanne Cleaver President, Wilson-Taylor Associates, Inc.
 231.299.1275 jycleaver@wilson-taylorassoc.com

Founding sponsor: Moss Adams National sponsor: CohnReznick
 Association partners: Accounting & Financial Women's Alliance
 American Woman's Society of CPA's

For more information on the MOVE project, visit the AFWA national website: www.afwa.org

**VITA – Volunteer Income Tax
Assistance Training
(Tax Preparer Refresher Course*)**

Date: Saturday, January 10, 2015

Time: 8:30 am – up to 4:30 pm

(Continental Breakfast and Lunch provided)

Location: DeVry University-Phoenix Campus

2149 West Dunlap Ave. Phoenix, AZ 85021

Room 201 (602-617-1904 – for questions on 1/10/15)

Filing Taxes Never Felt so Good! Tax time is stressful for everyone – especially low-income Arizonans and others who lack the skills or resources needed to get proper tax assistance. **But you can help!** As a Volunteer Income Tax Assistance (VITA) provider you work hands-on with families to help them receive the tax benefits they need to improve their lives.

8:30 am to 11:30 am - Tax Update Training to prepare basic and intermediate tax returns. Up to 3 hours of CPE.

Noon to 4:30 pm - VITA Certification Testing

*Attendees should have knowledge of IRS Tax Laws to complete this class. All IRS materials are electronic. You may only keep these materials if you sign up to volunteer at a VITA site.

Register for Free VITA Training at:

[2015 VITA Refresher Registration Link](#)

Co-Hosted by DeVry University, AFWA and IMA

Further Questions: Contact Joyce Barden, Senior Professor, DeVry/Keller at 602-617-1904 office (please leave message) or jbarden@devry.edu

BENEFITS OF MEMBERSHIP

- Prestigious status of professional affiliation
- National contacts for networking and professional information
- Forum for CPE
- Scholarship opportunities
- Leadership opportunities in supportive arena
- Subscription to *Accountability* e-Newsletter
- National and regional conferences at a discounted rate
- Access to Career Center
- Access to LinkedIn group
- National online membership directory
- Discounted membership to the Institute for Management Accountants (IMA)
- Discounted products and services through affiliation agreements (CPA review courses, CCH tax & accounting books, and Long Term Care Insurance)

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