



Accounting & Financial Women's Alliance

CONNECT • ADVANCE • LEAD

Mesa East Valley's IN TOUCH

November 2014

Vol 23, Issue 5

www.mesaeastvalleyafwa.org

President's Corner by Stacey Craig



Happy Early Thanksgiving!

As I reflect on all of the things I'm thankful for, I find myself thinking of how grateful I am for the opportunity to hone my leadership skills by serving on our chapter board. If you have not yet experienced this rewarding opportunity, I encourage you to start thinking about serving next year. We are always looking for fresh ideas and new energy on the board, and you just may be exactly what the chapter needs! This year's board continues to work hard to achieve the goals we set at the beginning of the year. To that end, we are collecting food donations at the November meeting and we have a fun bowling event planned for November 23rd. You won't want to miss it!

Don't forget that member attendance at chapter events is also one of our goals, and we need every member to do their part. We have a wonderful program planned for this month, and we are experimenting with two hours of CPE instead of one. Billy Vickers will be presenting "Forensic Accounting" in two sessions, the first of which begins at 5pm. Let us know what you think of the format! Looking ahead to December, Roger Gannon will be presenting a session on Team Building, members receive 50% off the meeting fee and we will be doing a gift exchange to celebrate the holidays. Hope to see you there!

Stacey Craig

Inside this issue:

President's Corner	1
Meeting Details	2
Announcements	3
Other group events	4
Updated Program Calendar 2014-15	5
MOVE Project	6
Contact Info	8





*"Nothing is more honourable
than a grateful heart."*

Seneca

*"What we're really talking
about is a wonderful day set
aside on the fourth Tuesday
of November when no one
diets. I mean, why else
would they call it Thanksgiv-
ing?"*

Erma Bombeck



November Meeting Details Tuesday, November 18, 2014

Double Session and Quarterly food Drive

- TOPIC:** Forensic Accounting
- LOCATION:** Landmark Restaurant
809 W Main St, Mesa
- DINNER:** Roast Turkey or Salad Room
- TIME:** 5:00 p.m. Session 1: Introduction to
Forensic Accounting
6:10 p.m. Dinner
7:00 p.m. Session 2: Forensic Accounting
Case Study
- COST:** \$26 member / \$32 guest / \$20 student

RSVP online at:

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

(Salad room option only after Nov. 14)

ADMINISTRATIVE POLICIES: If you would like to cancel a reservation, please contact Laura 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.
- **Bowling Social Event:** Join our chapter before a fun bowling event before the hectic holidays begin! Sunday, November 23 from 2 pm to 4 pm at the Brunswick Zone XL, 1160 S. Gilbert Rd., Gilbert, AZ. Cost is \$20 per person and includes bowling, shoes, pizza, salad, bread sticks and fun with other AFWA members and friends. Visit our website to register or contact Shelby (Shelby_williams@yahoo.com)
- **Community Service:**
 - 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
 - Quarterly Food Drive:** Please bring donations of non-perishable food to the November meeting for the United Food Bank. Monetary donations can also be made on their website, please put AFWA MEV as the food drive.
 - 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, PA
 - Visit 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):

-Lunch and Learn: Friday, November 21: 11:45 am to 1 pm: Arizona Sales Tax Update

-December Meeting: Tuesday, December 9: 5:30 pm—Dinner and One hour CPE. 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

AFWA Phoenix Chapter (www.phoenixafwa.org):

-November meeting, Thursday, Nov. 20: Medicare and 401(K) (2 CPE)

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.

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.

Meeting Location: ICAN Board Room
650 East Morelos Street
Chandler, AZ 85225
480-821-4207

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

Brenda@icanaz.org or Danielle@icanaz.org





Accounting & Financial Women's Alliance
CONNECT • ADVANCE • LEAD
Mesa East Valley Chapter

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

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)

Office	Name	Phone	Email
President	Stacey Craig		scraig23@cox.net
President-Elect	Open		
Treasurer	Deanna Schantel	602-568-9664	dschantel@cox.net
Assistant Treasurer	Kathleen Pease		kpease@go2uti.com
Secretary	Susan Stewart	602-758-6278	sstew56@yahoo.com
Past President	Diane Hewlett	480-705-7244	dianephx928@gmail.com
Membership Director	Patricia Schumacher	480-584-4344	Pks-cpa@cox.net
Programs Director	Ila Sowins-Dunmire	480-216-5383	iasowinsdunmire@cox.net
Asst Programs Director	Laura Mangan	480-276-5926	lauralynne@earthlink.net
Member Relations	Deanna Schantel	602-568-9664	dschantel@cox.net
By-Laws	Diane Hewlett	480-705-7244	dianephx928@gmail.com
Newsletter	Diane Hewlett	480-705-7244	dianephx928@gmail.com
Career Services	Deanna Schantel	602-568-9664	dschantel@cox.net
Webmaster	Laura Mangan	480-276-5926	lauralynne@earthlink.net
Assistant Webmaster	Diane Hewlett	480-705-7244	dianephx928@gmail.com
Public Relations	Laura Mangan	480-276-5926	lauralynne@earthlink.net
Education Foundation	Pat Donohue	480-218-0334	pkdonohue@cox.net
Scholarship	Shelby Williams	602-430-8834	Shelby_williams@yahoo.com
Activities	Shelby Williams	602-430-8834	Shelby_williams@yahoo.com
Community Service	Dayna Brown		daynab@woodsidehomes.com