



Mesa East Valley's IN TOUCH

January 2015

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www.mesaeastvalleyafwa.org

President's Corner by Stacey Craig



Well, we have reached the midway point of our fiscal year, and we've had some great programs, fun social events and rewarding community service opportunities. Thank you to all who have participated. Your volunteer board has worked very hard to make AFWA all it can be for our members, and I am really proud of what this group of busy and dedicated women has accomplished thus far. Thank you, ladies!

This is the perfect time of year to start thinking about what you can do for your chapter. We are looking for smart and talented women to serve on next year's board. Lucky for us, we are an organization full of such women. Please let me know if you are interested in serving. I will tell you that one of the best career decisions I ever made was to begin serving on the Phoenix chapter board back in 1999. I have developed leadership and public speaking skills that I never would have developed had I not taken that chance. Just as wonderful, I have had the opportunity to watch dozens of other women blossom in such roles as I have continued to serve at the chapter and national levels for both AFWA and its Foundation. It has been as rewarding as it has been educational.

This month brings our wildly popular tax update program. Anthony Forschino, from the Arizona Department of Revenue will be presenting the State Tax Update section of the program beginning at 5pm while Lisa Novack, from the IRS, will be presenting the Federal Tax Update at 7pm. It promises to be a very informative evening, and I hope to see you all there!

Stacey Craig

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January Meeting Details Tuesday, January 27, 2015

Annual Tax Update (2 hours CPE)

*"Far away there in the sunshine
are my highest aspirations. I may
not reach them, but I can look up
and see their beauty, believe in
them, and try to follow where they
lead."*

Louisa May Alcott

TOPIC: Federal and State Tax Updates
LOCATION: Landmark Restaurant
809 W Main St, Mesa
DINNER: Chicken Marsala or Salad Room
TIME: 5:00 p.m. State Tax Updates
6:10 p.m. Dinner
7:00 p.m. Federal Tax Updates
COST: \$26 member / \$32 guest / \$20 student

RSVP online at:

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

(Salad room option only after Jan. 23)

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

*"If you want to live a happy life, tie
it to a goal, not to people or
things."*

— [Albert Einstein](#)

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:**
 - 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
- **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.
- **AFWA Scholarships**
 - The deadline has passed for our chapter scholarships, but many scholarships are available from AFWA National. Please see Page 8 for more information and how to apply.

Heart Walk—join the Number Crunchers Team!

Saturday, March 21

In 1999 the American Heart Association set a bold 10-year goal: To reduce coronary heart disease, stroke and risk by 25 percent by 2010. We achieved the reduction in deaths ahead of schedule and made substantial progress against three of the six risk factors. Because of this success, the Board of Directors approved a 2020 Impact Goal. This new goal looks beyond helping people reduce their risk of heart disease and stroke by focusing on helping them build stronger health and a better quality of life.

The 2015 Phoenix Heart Walk event will be held on March 21st at the Wesley Bolin Plaza, Downtown Phoenix. The Heart Walk is a non-competitive event including two different paths; a 5k Heart Walk and 1 mile Stroke Walk followed by a heart healthy festival. Put your walking shoes on and participate or come down and cheer the walkers and pick up some great information on staying healthy.

Join Team Captain Laura Mangan and AFWA and IMA members on the **Number Crunchers Team** for either the 1 mile or 5K route or make a donation to support our team. Visit our team page:

<http://phoenixheartwalk.kintera.org/numbercrunchers> to sign up or donate or both!

Meetings and Events around Phoenix

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

- Breakfast Meeting: Friday, January 30:** “Your Prized Executive is Leaving, Now What?”
Paradise Bakery, Raintree, Scottsdale
- February Meeting: Tuesday, February 17:** “Global IMA Update and Financial Leadership in Today’s World”
presented by IMA Global Past President, Jeff Thomson
- Breakfast Meeting:** Thursday, March 10: “How do Nonprofits win Foundation Grants”
- Lunch and Learn:** Friday, April 17: “Preparing Succession Plans”

AFWA Phoenix Chapter (www.phoenixafwa.org):

- January meeting, Thursday, Jan. 15, 5:00 pm:** “The Affordable Care Act and its Affect on Personal and Corporate Income Taxes”, Jerry Bordeleau, CPA (2 hours 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.

Several other cities, including Chandler, Tempe, and Phoenix, have VITA programs and are looking for volunteers also. If you are interested in helping in one of these cities, please visit the city website and search under “VITA”.

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 finding 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





Accounting & Financial Women's Alliance
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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.

Fun times at our Fall Events



*AFWA Annual Conference
New Orleans, LA*



Our annual holiday gift exchange!

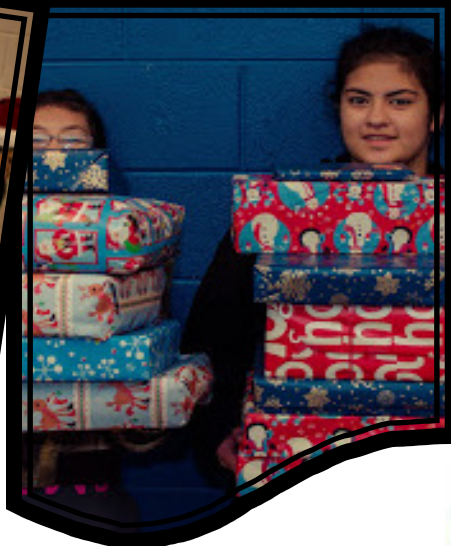
Volunteers helping at ICAN





Thank You Accounting & Financial Women's Alliance

December 12, 2014





AFWA Foundation Scholarships

(Please visit their webpage for live links of this information: www.afwa.org/foundation/scholarships)

THE
Foundation OF
Accounting & Financial Women's Alliance
EDUCATE ■ GUIDE ■ SUCCEED

The mission of the Foundation is to promote and advance education, career development and leadership in finance and accounting, with the goal of guiding women to achieve success in their careers. We believe that to decrease barriers for women in the accounting and financial profession, education and access to career development resources are essential. The Foundation aims to ensure women will have the tools and resources to achieve every career success they desire.

NOW OPEN: UNDERGRADUATE AND MASTERS SCHOLARSHIPS FOR ACCOUNTING AND FINANCE STUDENTS. Applications due April 1, 2015.

Undergraduate Scholarship: To support the costs of attending 3rd, 4th, or 5th year when pursuing an accounting or finance degree. [Download the Undergraduate application.](#)

Masters Scholarship: For those attending an accredited College or University enrolled in a master's program, and is pursuing an accounting or finance degree. [Download the Masters application.](#)

Endorsement Form: You do not need to be a member of AFWA, or affiliated with a Chapter to apply for the Undergraduate and Masters Scholarship. However, if you have an endorsement from an AFWA member or Chapter, please enclose [this form](#) with your application. [Click now to find an AFWA Chapter near you.](#)

More Scholarships from the Foundation of AFWA

Finance and Accounting Scholarships: The undergraduate and master's scholarships are open to the public.

- **Undergraduate Scholarships** – To support the costs of attending 3rd, 4th, or 5th year when pursuing an accounting or finance degree.
- Including the [Paula Zanni Award](#), presented annually to one outstanding undergraduate scholar.
- **Master's Scholarships** – For those attending an accredited College or University enrolled in a master's program, and is pursuing an accounting or finance degree.
- **Native American Scholarship** – To support the costs of attending 3rd, 4th, or 5th year when pursuing an accounting or finance degree. Applicant must be enrolled or a direct descendant of an enrolled member in a Federal or State recognized tribe.

AFWA Member Scholarships: Applicants must be a current member of AFWA to be considered. To apply, log into the [AFWA Member site](#) and find current applications in the Member Resources section. Or, contact your chapter scholarship chair or president for more information. Visit our [Chapter Directory](#) now

- **Certification** – To support the exam fees of AFWA members for any one of the following certifications: CPA, CFP, CFE, CIA, CMA, or CVA.
- **CPAexcel Review** – To provide registration for a CPAexcel CPA Review Course

PhD Scholarship – To cover the cost of research for a student seeking a PhD degree in accounting. Applications due annually by March 1.

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