

# The Bulletin

A monthly publication of Omaha Chapter #101

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Publisher: April Nerz

## January Meeting Info

- January 11th, 11:30am
- Fernando's (114th and Dodge)
- \$9 (includes choice of meal, soft drink, dessert, tip and tax)

• **Please RSVP by Monday 1/10 at 3pm!**

- Please register for this event at:  
[http://  
aswaomaha.eventbrite.com](http://aswaomaha.eventbrite.com)

Menu choices will be available at this site as soon as possible. You may choose to pay online or at the door when registering online.

If you prefer to make reservations by email or phone, please contact:  
**Janet Redick @ [jredick@cox.net](mailto:jredick@cox.net)**  
or 402-572-6639

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## American Society of Women Accountants

### PRESIDENT'S MESSAGE

#### Happy New Year!

The magical blessings of the holiday season always give me a fresh perspective and new motivation. I realize time is a precious resource but I encourage you to invest a few moments in yourself by created a plan for you. You are the CEO of your life! My father always said an ounce of planning is a pound of production and that sharing your goals helps you attain them. Who better to share your goals with than like-minded ASWA friends? The talents, friendships and mentors that we possess are amazing gifts. So let's continue to share these

gifts and motivate each other. Please post your new year's resolutions and comments on our LinkedIn discussion. <http://tinyurl.com/375xz2s>

Your insight on what the ASWA Omaha Chapter should START, STOP and KEEP doing is crucial to our future. **Complete this five-question survey by January 14th <http://www.zoomerang.com/Survey/WEB22BPR7SUA7Z>** and please, don't hold back :) We will be reviewing the results at our **Mid-Year Planning Session on January 17th** at 5:30pm at my office - C&A Industries, 13609 California

Street (132nd & Dodge). This is your chance to shape our chapter and get involved a little (or a lot)!

Our agenda will include:

- Survey results - brainstorming session
- 2012 Regional Conference
- 2011-2012 Board Nominations
- Financial Literacy Committee
- Mentoring program
- Open floor

Pizza, salad and soda will be provided!

Here's to a FABULOUS 2011!

**Chris Carlson, MBA, CPC**

**President 2010 - 2011**

Kansas City Chapter 60th Anniversary Dinner Celebration  
Tuesday, January 18, 2011 • Cocktails 5:30 • Dinner 6:30  
M & S Grill  
4646 J C Nichols Parkway  
Kansas City, MO 64112  
Cost \$40.00  
RSVP to [Jessica.Galati@HCAHealthcare.com](mailto:Jessica.Galati@HCAHealthcare.com) by January 12, 2011

### January Speaker Profile

Annette J. Wells, CPA, MPA received her Bachelor of Arts degree in Accounting and Business Administration with an emphasis in Management and Human Resources from Doane College in 2001. In 2010, Annette received her Masters in Professional Accountancy from Midland Lutheran College.

Annette joined Koski Professional Group, P.C. in January 2008. Annette's nine plus years of experience in public accounting has given her an opportunity to work on a variety of tax and accounting projects. Annette has been involved the following specialty services areas: Cost Segregation Reports, Estate and Gift Planning, County Inheritance Tax Filings, Compilations and Reviews, and Business Succession Planning. Annette enjoys training small- and medium-sized businesses in establishing good bookkeeping practices.

Annette has provided services to clients in many industries including agriculture, retail stores, physicians, building sub-contractors and high wealth individuals.

Annette is a past president of the Omaha Chapter of the American Society of Women Accountants, and remains active as a current member of the board of directors. Annette is also a member of the Nebraska Society of Certified Public Accountants.

Please send any information you'd like included in the next edition of The Bulletin to April Nerz by January 20th!  
[anertz@cox.net](mailto:anertz@cox.net)

### 2010—2011 Board of Directors

**President:** Chris Carlson, CPC, MBA

**Past President:** Annette Wells, CPA, MPA

**President Elect:** Karen Hosier, MBA

**VP of Program / Membership:** Lisa Brannan

**Treasurer:** Terri Fuqua

**Secretary:** Amy Thompson, CPA

**Communications Director:** April Nerz, CIA

See the local website for contact information [www.aswaomaha.org](http://www.aswaomaha.org)

[www.aswa.org](http://www.aswa.org)

<http://aswaomaha.eventbrite.com>

### FOOTNOTES:

- FOR IRS UPDATES AND CPE OPPORTUNITIES, SEE THE BULLETIN EMAIL ATTACHMENTS. ADDITIONAL INFORMATION CAN BE FOUND AT OUR LINKEDIN PAGE > PROMOTIONS SECTION AT [http://www.linkedin.com/groupRegistration?gid=2040308!](http://www.linkedin.com/groupRegistration?gid=2040308)

## January 2011

**Calling all ASWA Omaha members!**

We are looking for volunteers who are interested in serving on the 2011-2012 Board of Directors. The BOD meets once monthly in addition to the regular monthly meetings. **This is your opportunity to get involved and make a difference in our chapter.** We encourage self-nominations or nominations of someone who you think would lead our chapter in the right direction.

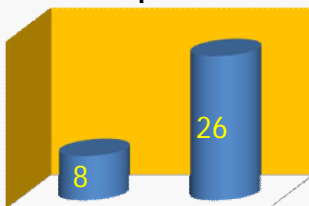
If you are interested in getting more involved, please contact Annette Wells [awells@koskicpa.com](mailto:awells@koskicpa.com) or 402-445-4040.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10th RSVP for meeting	11th Lunch meeting		13	14	15
16	MLK Jr. Day	18th KC Chapter 60th Anniversary dinner		20th February Bulletin info due!		22
23	24	25	26	27	28	29
30	31	Scholarship applications are due <b>February 1st, 2011</b> . Contact Kerry Clark at <a href="mailto:kaclark97@gmail.com">kaclark97@gmail.com</a> for more information.				

**Don't Forget!**

- ALL fiscal year 2010-2011 regular meetings will be held at **Fernando's** at 114th and Dodge on the **second Tuesday** of each month unless otherwise noted.
- All board meetings will be held at the **C&A Industries** offices on the **last Tuesday** of every month unless otherwise noted.

### New Member Goal Update



New members as of December

**For more opportunities to volunteer and get involved, please review the committee descriptions on page three and contact a board member today!**

# Committee Descriptions

## **Communication (Bulletin, Roster, Advertising, Website, Publicity, Database, Brochure)**

- Gather information for and create monthly Bulletin newsletter, annual brochure and bi-annual chapter roster
- Publicize events to local and regional media sources
- Solicit advertisers from local and regional businesses
- Ensure chapter website is updated
- Take photographs at chapter events
- Maintain chapter contact information database
- Direct all outside inquiries to the correct chair/board member
- Coordinate with all board members and committee chairs for any necessary information/documentation distributions

## **Administrative Reporting (Bylaws, Long Range Planning, Admin Reporting, Compilation)**

- Update chapter bylaws, evaluate compliance with national bylaws and communicate to membership as necessary
- Assist chapter President with Long Range Planning as necessary
- Summarize and consolidate committee goals and communicate results to Regional Director
- Assist with chapter compilation as necessary
- Host Mid-Year Goal Meeting

## **Program (Menu, Education, Speakers, Hospitality)**

- Communicate with meeting venue(s) regarding meeting rooms and menus for all chapter and board meetings as necessary
- Solicit and secure speakers for all chapter meetings (includes CPE speakers)
- Submit speaker biographies to Communication Chair for monthly Bulletin publishing
- Make all necessary speaker arrangements for meetings (including equipment, meals, etc.)
- Send thank-you notes to speakers
- Submit CPE to State of Nebraska and ASWA
- Ensure all attendees receive CPE certificates as needed
- Submit technical articles to Communication Chair for distribution to membership
- Ensure online reservation system (Eventbrite) is updated; take any phone and email reservations
- Ensure meeting guests are greeted
- Check in all attendees and ensure payment is received
- Submit attendance list to Membership Chair to record member points

## **Member Services (Member Points, Membership Applications, Host Guests, Chapter Development, Scholarships and Recruiting)**

- Maintain member points for fiscal year
- Purchase gifts and other awards distributed at June meeting
- Coordinate with Annual Events chair regarding PR Dinner roses and other recognition items
- Acknowledge meeting and annual event guests
- Provide guests with any documentation needed
- Facilitate guest/member interaction/networking
- Follow up with guests after meeting attendance
- Follow up with non-renewing members (gather feedback if appropriate)
- Communicate member news to Communication Chair for Bulletin newsletter publishing
- Visit student organizations to promote ASWA and recruit members
- Coordinate with Communication Chair regarding distribution of flyers, scholarship applications, Bulletin
- Recruit other members for scholarship application review and evaluation
- Select chapter scholarship winner(s) and present at the annual PR Dinner

## **Annual Events (Student Recruiting/New Member Night, PR Dinner/Basket Raffle/Lady Vestey, Community Events, Surveys)**

- Coordinate with other board members and committee chairs as necessary for the following:
- Publicize annual events
- Select and secure annual event venues
- Solicit and secure speakers
- Solicit and secure donations
- Solicit Lady Vestey nominations and select a winner
- Present Lady Vestey award at annual PR Dinner