



# CURRENT ASSETS

## July 2013 Membership Meeting

## JULY KEYNOTE SPEAKER:

### LYNDA R. BOMAN, CPA

- Date** July 23<sup>rd</sup>, 2013
- Doors Open** 6:00 pm
- Location** Biltmore Hotel & Suites  
2151 Laurelwood Road  
Santa Clara, CA 95054
- Presentation** Public Speaking
- Cost** Day of Event at the Door:  
Members = \$35.00  
Guests = \$45.00
- Pre-Registration:** For your convenience at a discount rate using...



On-Line at our Chapter web site:  
<http://www.afwasiliconvalley.org>  
Discount Rate:  
Members = \$35.00  
Guests = \$45.00



Lynda's focus and specialty is working with many types of non-profit organizations. She enjoys the unique accounting nature of non-profit organizations as well as interacting with the truly amazing staff that keep the vision of the organization alive. With the experience she has obtained in more than twenty years in public accounting, and the desire to create a firm that specializes in non-profit organizations, she opened her own practice in 2003. She is energized by the opportunities that are available to her to work with dynamic organizations and she provides value over and above the final board presentation.

Lynda began her accounting career while in school earning a Bachelor's Degree in Accounting and a Master's Degree in Taxation. She worked for several local CPA firms in the bay area, keeping a balance between tax and audit work before forming her own practice. She earned her Certified Public Accounting license in 1996. She is a member of the California Society of Certified Public Accountants, and the California Association of Non-Profits. She has served as the co-chair of the non-profit interest group for the Silicon Valley Chapter of Cal-CPA. She frequently attends seminars to stay current on tax exempt organization laws.

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### Next Month...

### August 2013

<b>Date</b>	<b>August 27<sup>th</sup></b>
<b>Time</b>	<b>6:00 pm – 9:00 pm</b>
<b>Presentation</b>	<b>Ethics</b>
<b>Keynote Speaker</b>	<b>TBA</b>
<b>Pre-Register at...</b>	<b><a href="http://www.afwasiliconvalley.org">www.afwasiliconvalley.org</a></b>

Got Smart Phone? Scan below to go to our web site



*Silicon Valley Chapter #103*

Empowering Women in the Accounting and Financial Professions since 1938!



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2013-2014

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*EDRONDA GUIRIBA*  
*EDRONDAGUIRIBA@GMAIL.COM*

---

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*EILEEN.EPERRY@GMAIL.COM*

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PROGRAM CHAIR:  
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*TAWNY888@GMAIL.COM*

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SCHOLARSHIP CHAIR:  
*MONIKA MILES*  
*MONIKA@LABHARTMILES.COM*

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WEBSITE:  
*OUTSOURCED*

**PRESIDENT'S MESSAGE**

This is my first President's message and I have so much to say.

I am honored to be part of AFWA, Silicon Valley Chapter. My thanks to our outgoing President, Sue Stokke, who has set a great example to follow. She has worked with the board to create a truly winning team. I hope to continue down this path. When I came to my first then ASWA meeting I was surprised at variety of jobs in the accounting field that is represented in our group. The speakers were very interesting and I kept on coming back. I was a guest for eighteen months.

I was encouraged to join the organization and have never regretted the decision to do so. The only time I learned more about accounting was when I was a student attending San Jose State. This organization encourages us to develop as professionals while learning more about our industry. It is important to keep learning to keep our minds sharp, and to be current, so we are legally compliant.

Our next meeting is the strategic planning meeting. In order to achieve the same level of success in this year that Sue was able achieve in her tenure we need to come together to plan for the year. Statistics show that decisions made as a group are generally have a higher correct percentage than those made by a single person for the group.

The book that I have chosen for the year is "What to Say When You Talk to Yourself" by Shad Helmstetter PhD. I first started reading this book when I was out of work and thought I would never find a job. Within a matter of weeks I had enrolled in school and gotten a job that would pay for my education. I had only read a couple chapters and things started to change in my life.

Our membership includes many people going through change (e.g., studying for the CPA exam) and I thought that this would be a good choice. We all need a cheerleader in our life at times, and sometimes that cheerleader has to come from within ourselves.

I look forward to working with you and seeing you all at our next meeting..

-Julia Becklund, President AFWA Silicon Valley



### 2013 Annual Conference



### 2013 Accounting & Financial Women's Alliance Annual Conference October 20-23, 2013 Hyatt Regency, Indianapolis, IN

Don't miss this opportunity to network with other women in accounting and finance from across the country. Join us this fall in Indianapolis and learn from leading experts on ways to develop a variety of your skills. The Accounting & Financial Women's Alliance Annual Conference will be loaded with opportunities for networking, leadership development, education and fun!

**Online Registration** and the **Program Schedule** are coming soon. Stay tuned!

**Hotel Accommodations:** For hotel reservations at the Hyatt Regency Indianapolis, please call 1-888-421-1442 no later than **September 27, 2013** and be sure to mention "Accounting & Financial Women's Alliance" to receive the group rate of \$159/night.

### Be a "Snoop"!

The Editor of the Newsletter is looking for "Snoops" or Reporters to take photos and conduct interviews.

This can be a one-time-hit wonderful experience, or hop on board to the frequent flyer program, the choice is yours!

For details see Edronda Guiriba at the Membership Meetings or email her at [EdrondaGuiriba@gmail.com](mailto:EdrondaGuiriba@gmail.com)

### DO YOU THINK 100 PEOPLE IN ATTENDANCE OF OUR MEETINGS POSSIBLE???

YES WE CAN!  
POST AN UPDATE ON YOUR LINKED-IN AND FACEBOOK ACCOUNT ABOUT OUR GROUP. ONCE A WEEK WOULD BE WONDERFUL!

### LOOKING FOR SPONSORS...

There are four sponsor levels of contribution established for the scholarship fund.

**Bronze:**  
Sponsorship up to \$150.00

**Silver:**  
Sponsorship up to \$300.00

**Gold:**  
Sponsorship up to \$500.00

**Platinum:**  
Sponsorship over \$500.00



Sponsor letter and form available. Share the information! See Monika Miles for more details.



**SAVE THE DATE!**

Upcoming Membership meetings...

August 27<sup>th</sup>, 2013

Ethics

September 17<sup>th</sup>, 2013

IMA Networking

September 24<sup>th</sup>, 2013

Employment Law

October 29<sup>th</sup>, 2013

Leadership Skills

**Pencil in ASWA to your Calendar.  
We MISS You!**

Excerpt from the National Chapter of AFWA...

# ACCOUNTability

AFWA Update:

And Now for Coffee and Dessert... June 2013 Issue

By Cheryl Heitz, Accounting & Financial Women's Alliance National President

As I sit here in my final month of my presidency, it is time to reflect on the great year we've had and look forward to the future. Looking back, I realize that 2012-2013 was truly the year of change.

We launched a new membership campaign late last summer. For several years the campaign prizes were a free conference registration. This year's campaign is divided into three parts: an individual recruiting goal with cool prizes such as Kindle Fires and iPads, a chapter recruitment and retention goal with \$1,000 prizes for chapters, and a bonus campaign for the "Chapter Launch Party" initiative created around our name change. I hope all of you and your chapters are excited about the campaign prizes and have participated by recruiting new members.

In early October we released the second part of our special diversity report focusing on "[Solutions to Increase Diversity in the Accounting and Finance Fields.](#)" This is an excellent publication that can really help companies and

firms embrace the demographic shifts in the workforce. If you haven't looked at it, please do and share it with your organization. We also highlighted the importance of embracing diversity with our first-ever panel discussion that was held at the conference, including the CEOs of diverse accounting and business associations such as ALPFA, Ascend and Financial Executives Institute.

We implemented a few other changes within our conference in San Diego. After eight years of jointly hosting our annual conference with AWS CPA, this year we brought the conference back in house in order to achieve better brand consistency. We are happy with the result and that our conference continues to be successful. The Foundation concluded the Amazing Foundation Race, which many people participated in and had a great time.

And of course, there was the passage of the bylaw amendment to change our name to the Accounting and Financial Women's Alliance. The new name required many more decisions than I ever imagined. There is the new logo, color selection, font decisions, banner layout, web site updates, publication updates, names tags, business cards and the list goes on. Luckily we have a great team of committee members: Julianne Dorsett, Tyna Gaylor, Linda Harris, Lori Kelley, Monika Miles, Kate Mulder, and Dianna Patton along with our experts at Headquarters that all helped guide this process. One thing I am particularly excited about is a new membership brochure. We have needed one for several years, and this one is pretty, fresh and inspiring.

For a sneak peek into next year, I am excited to share that we will be launching a redesign of the website. We are all thrilled to change our website to be more attractive to prospective members, while making it easier for our current members to navigate. We hope to launch the new website in late summer. The other exciting change is the launch of a pilot student chapter.

But even in the year of change – there are things that remain same and that I love about AFWA, the friendships and relationships that I have formed as a member of the board and serving as a volunteer for this great organization. I have had a very eventful year and appreciate all the people who have helped me along the way. I am enthusiastic for the future and happy to turn over the torch to Kate and the new board. I am sure they will continue this great legacy of success. Thank you for the honor of serving as the 2012-2013 National President.



Regards,  
Cheryl Heitz, 2012-2013 Accounting & Financial Women's Alliance National President



Founded in 1938, AFWA/ASWA provides women in accounting and finance the leadership, education and networking opportunities needed to achieve their career goals. Celebrating 75 years as the only organization that solely represents the interest of women in the entire accounting and finance community. The organization's mission is to enable women in all accounting and related fields to achieve their full personal, professional and economic potential and to contribute to the future development of their profession.



*Want to know more about Business Events and Resources throughout the Bay Area? Connect with...*

## Silicon Valley Chapter

 **WorkIt** and get weekly information on a variety of venues. Subscribe at...

<http://www.workit.com>

Silicon Valley AFWA / ASWA is a 501(c) (6) not-for-profit organization (separate from the scholarship fund). Join our group on **LinkedIn** for updates

# COMMITTEE UPDATES

## Programs

**Chair: Tawnya Schwartz**

There is an excellent line-up of programs for the Silicon Valley Chapter this year, and most of them qualify for CPE! Check out the line-up as we have engaged some dynamic and outstanding speakers.



<u>July</u>	Giving to Charities
6:00 pm	Biltmore Hotel
<u>August</u>	Ethics
6:00 pm	Biltmore Hotel
<u>September</u>	Employment Law
6:00 pm	Biltmore Hotel



## Hospitality / CPE Compliance

**Hospitality Chair: Amrit Dhaliwal**

**CPE Compliance: Nicole Tran**

*Reservation and cancellation policy:*

Reservations or cancellations are requested by noon on the Friday preceding each meeting.

Email [amrit@expertquote.com](mailto:amrit@expertquote.com) to reserve or cancel. The goal is an accurate count for the hotel. Unreserved members (not guests) incur a surcharge of \$5.00.

Reserved members or guests who are no-shows will be billed if not cancelled by noon the preceding Friday. We do want you to come to the meetings and reservations are helpful but if you have to cancel let us know beforehand to avoid incurring the cost of the meal. ***WE ACCEPT CREDIT CARD PAYMENT AT THE DOOR!***



Volunteers are always welcome at our monthly membership meetings. Lend a helping hand to make our monthly events and meetings even more interesting while building a great network and forming new relationships.

CPE credit is available for participating in any of our qualified programs. See Nicole for more details in person at the meeting or email her at [NICOLETRANNT@GMAIL.COM](mailto:NICOLETRANNT@GMAIL.COM).

## Newsletter

**Chair: Edronda Guiriba**

The newsletter is prepared and distributed on a monthly basis. Visit our web site at [www.afwasiliconvalley.org](http://www.afwasiliconvalley.org). If this Chapter does not have your e-mail address, please contact Edronda at [edrondaguiriba@gmail.com](mailto:edrondaguiriba@gmail.com)

We encourage our membership to submit articles of interest for our monthly newsletter. Please make your submission under the following criteria...

- Prepared as a Microsoft Word document
- Photos in JPEG format
- captions are okay, no imbedded text, please
- 600 words or less



## Membership

**Chair: Eileen Perry**

**QUALIFICATIONS:**

All Levels of Accounting & Finance  
Bookkeepers  
Corporate Accounting Finance  
Public Accounting  
Management & Educators  
Recruiters

If you would like to join the Silicon Valley Chapter of AFWA, follow the link to our National website.

**[HTTP://WWW.AFWA.ORG](http://www.afwa.org)**

Please feel free to complete the application or forward a copy to someone you think would benefit from joining our Chapter.

## MEMBERSHIP BENEFITS

- Prestigious status of professional affiliation
- National contacts for networking and professional information
- Forum for CPE
- Scholarships
- Leadership opportunities in supportive arena
- Subscription to *Accountability* e-newsletter
- National and regional conferences at a discounted rate
- Access to Career Center
- Access to [AFWA's LinkedIn, Facebook and Twitter groups](#) and 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, Long Term Care Insurance and Bank of America credit card.



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