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PRESIDENT'S MESSAGE

Dear Members and Friends of the Philadelphia Chapter:

I haven't heard from many of our members this month as expected. Those few that I have heard from tell me they are swamped with their tax season deadlines. Many of you probably don't have time to read this newsletter but I wanted to get it to you early enough to plan for after April 15th.

I have to say that I miss you all during this time, but it gives me something else to look forward to once the deadline is met, our April Meeting! I have been awaiting this one, since last April when we attended the Alice Paul Equality Awards Dinner. There I gained an appreciation for a woman of inspiration, who lived in my own back yard.

Alice Stokes Paul (1885-1977) was born in Mt Laurel, NJ. She dedicated her life to the single cause of securing equal rights for all women. Alice led the final campaign for women's right to vote. After the 1920 victory, she authored the Equal Rights Amendment and initiated gender equality principles in both the United Nations Charter and in the 1964 Civil Rights Act. Where would we be without women like Alice Paul to lead us and break through so many barriers that our grandmothers and great-grandmothers faced in their daily lives. If it doesn't hit home in our own generation, look back to those who loved and nurtured us and our parents. These are the women who felt the strains of inequality.

The Alice Paul Institute (API) is a non-profit 501c (3) organization based in Mount Laurel on the original homestead of Alice Paul. API educates the public about the life and work of Alice Paul and continues that work by educating and empowering women and girls from all segments of society to take leadership roles in their schools and communities.

I am very happy that we will be holding our next meeting on a late Saturday morning - April 25th at the Alice Paul Institute where we will get a first hand history lesson and tour of the property. In addition, we will have a CPE session given by Larry Kagan and Teresa Nino of Merrill Lynch on Credit Fraud and Identity Theft. With the state of the economy and for some, very desperate times, it is important for all of us to know how best to protect ourselves from credit fraud and identity thefts. What a wonderful way to spend an early afternoon!

Please add the date to your Outlook and remind yourself to RSVP by the deadline. Join me for a lovely brunch sponsored by Merrill Lynch.

In the meantime, take your vitamins, drink plenty of water, eat fresh veggies and fruit, healthy chocolate and take advantage of any exercise you can manage as you burn the candle at both ends during this tax season! We need to stay healthy and alert. Oh, and don't forget to hug the ones you love as much as possible. I find it very energizing! With Michael in Utah, Mom and the Nieces and Nephews are my "Hug Victims"!

Stay ASAP that is - as sane as possible!

Very truly yours,
Lori Lucente-McKeage
Philadelphia Chapter President

April 2009 MEETING

Event: **Identity Theft - Protecting Your Personal Information**

Location: **Alice Paul Institute**
128 Hooton Road
Mount Laurel, NJ 08054
(856) 231-4223
www.alicepaul.org
email: info@alicepaul.org

Date/Time: **Saturday, April 25, 2009 at 10am for A Lovely Brunch**

Meeting Fee: **Regular Members: \$ 25**
Guests: \$ 30
Student: \$ 20

RSVP: **To Pam Wenner at 610-254-8961 ext 23 or**
Email pwenner@bkicpa.com by Thursday April 16, 2009

About our Program:

This month's CPE session, *Identity Theft and Protecting Your Personal Information*, will help educate on how identity theft and fraud occurs—in person, online and on the phone. It outlines the steps individuals can take to protect themselves and their families from identity theft, and what to do if they suspect their identity is stolen or if they suspect fraudulent activity.

About our Speakers:

Laurence M. Kagan, Financial Advisor, CSNA

Larry joined Merrill Lynch after an eight year career as an attorney in Philadelphia and New York. His areas of practice as a lawyer included trusts and estates as well as real estate and corporate transactions.

As a financial advisor, Larry works closely with clients to develop and implement long-term financial plans as well as manage the distribution of assets while protecting and educating families as to the potential dangers and benefits of significant wealth.

He currently holds his Series 7, 66 and Life and Health licenses; Larry's practice is national in scope with clients from Pennsylvania to California. He resides in center city Philadelphia where he enjoys spending time with his wife, Bethann, and their two children, Sophia and Jeremy. He is also very active in several children's charities in the Philadelphia area and serves as Chairman to the National Foundation for Celiac Awareness.

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BY LAWS

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MENTOR PROGRAM

Theresa Copeland
170 Fariston Drive
Philadelphia, PA 19120



The April Meeting is being sponsored by Merrill Lynch. For more information about their services please go to www.totalmerrill.com. The Philadelphia Chapter of ASWA would like to thank Merrill Lynch for their support.

More about . . . our Speakers:

Teresa C. Nino, Financial Advisor

Teresa joined Merrill Lynch after enjoying a career as the CEO of a successful marketing firm in Washington D.C. and Memphis, TN. She helped her clients, including Verizon, Cingular, Direct TV, BellSouth and AT&T to expand their marketing and client acquisition. Teresa also had an opportunity to work on Capitol Hill with U.S. Senator Arlen Specter of Pennsylvania. There she assisted in press and media relations.

Teresa is a native of the Philadelphia area and graduate of Hatboro-Horsham High School. She holds a Series 7, 66, and Life & Health licenses, and she earned her BA in History and Literature from American University.

She is involved in her community serving the Chamber of Commerce in Philadelphia, Haddon Heights Rotary Club, Eastern Star of Philadelphia, Abington Township's ATRO as the Chair of PR and Marketing and the Communications Committee, the National Foundation for Celiac Awareness (NFCA) and Daddy's Spirit which helps support children who are grieving the loss of their father. Teresa also volunteers her time at the Children's Hospital of Philadelphia, Ronald McDonald House and as a CCD teacher.

☞ The Spotlight this month:☞

Congratulations to Mary Duff !!!!!

In addition to being installed as one of the Directors of our National Board, at the Regional Conference in Arizona on May 2, 2009, Mary was appointed as a Director of the Foundation Board for next year. One of the National Board Directors is required to serve on the Foundation Board and Mary Duff, our past president and soon to be former Regional Director has been chosen. We are all very proud of Mary's achievements and appreciate her continued service to our organization from the National perspective. Mary can surely count on us for our Chapter's support.

The Recipient of the Philadelphia Chapter ASWA Scholarship is Drexel University Junior, Mariya Kunets

Please join us in congratulating Mariya at the Alice Paul Institute on April 25th when we will be presenting her with The Philadelphia Chapters Annual Scholarship. This year the award is a check in the amount of \$ 2,000.00.

Mariya's application has been submitted to National as a candidate for our National Scholarship. In the chapter's submission, we were asked to give an explanation for our choice. Jean Rigney, our scholarship chair, provided this brief summary of the reasons this candidate scored so high with our scholarship committee.

Reason for selecting candidate:

Mariya is a foreign student and English is a second language for her. She earned a 4.0 GPA at both the community college she attended and now at Drexel University. In addition she has an impressive list of honors and extracurricular activities. Mariya received excellent recommendations from her professors. However, the most compelling reason we chose Mariya is that she achieved all this while supporting herself. She has paid for her education with scholarships, loans and the salary she has earned with jobs in the Drexel University Co-op Program and has no financial support from family.

Mariya we wish you the best of luck as you continue your studies at Drexel.

Best of luck for the National Scholarship as well!

Special Thanks to our Scholarship Committee: Volunteers are very hard to come by naturally. So when Lori McKeage tapped the shoulder of some new prospects, these ladies rose to the occasion.

Marian Borzelleca, Mary Ann O’Neill, Valarie Rothermel and Jennifer Trolley accepted the task. Along with Lori McKeage and co-chairs Jean Rigney and Bambi Weber, the seven took the time to evaluate the thirteen applications we received this year. The board would like to thank these ladies for their participation in this annual event.

Special Thanks to our Scholarship Applicants:

Dear Scholarship Applicant,

We sincerely appreciate your taking the time to apply for our scholarship. We had so many quality applicants, that it was very difficult not to breakdown the amount we pledged in order to give to more worthy candidates who could use this money to fund your education. Unfortunately, only one could be given out as a result of our board action. We hope you, our candidates continue to pursue our scholarships in the future and to utilize our organizations many benefits to help you develop your career path.

Many of the applicants are involved in our mentor program and are already members of the organization. They already have an outstanding rank above their peers by actively participating in this professional organization. They have leadership aspirations and continue to be involved in multiple organizations, campus clubs and charities. In reading your applications, I found myself cheering your accomplishments, your academic achievements and your interest in pursuing a career in accounting with the enthusiasm of making a difference!

Thank you all for participating and I wish you the best in all you do. Our members of the Philadelphia Chapter continue to be eager to assist you.

Sincerely,

Lori McKeage



Welcome New Member Valarie Rothermel

Valarie graduated from Delaware Valley College in December of 2007 where she tells us Liz Kolar inspired her to go into the accounting field. She is currently working for St. Clair CPA Solutions. This is her 3rd tax season with the firm. Valarie is pursuing the CPA. She only passed one part so far (REG), but only missed the other 3 by 1 – 4 points, she has been so close. Val is originally from Allentown, and now lives in Conshohocken. She has a younger sister who just graduated from Penn State this past December and moved to Wisconsin. She also just got engaged in January, and is very excited about that!

Valarie is very family oriented; she tells us "this is a huge part of who I am. My sister and I tell my parents everything. We are a very close family. Every great memory of my childhood I have involves my family. Our family traveled a lot when I was young. I have grandparents in Maine and Florida, so I have been everywhere in the east coast. I love the outdoors, skiing, hiking, you name it and I will try it. When I was young I played just about every sport, but when I reached high school I stopped playing because I did not like the competition. I continue to be involved in sports for fun and the exercise.

Please be sure to introduce yourself to Valarie at her next meeting.

An update on our Student Member Kim Buziak:

Kim was in a horrific accident some days following our January meeting, which she attended. She broke both legs and suffered head injuries. Lori contacted Kim recently to see how she was coming along and Kim told her that she has started outpatient rehab to help strengthen her muscles that haven't been used since the accident. She has moved on from a walker to crutches, so she is definitely improving. She hopes to attend the meeting in April if she is able. She would like to say hello to everyone and thank you for the get well card. Kim began the year as a mentee with Cathy Minns as her mentor. Kim wishes her competing mentees great success in the program and hopes to participate fully in the program next year.

The Mentor Program Achievement Contest

The results are in for the third month of the Achievement Contest. February and March are tough months for gaining points for activities as our mentors involved in tax practice have little time. So here is where they stand through February.

Team Green: - Marian Derr and Kari Davidson hold their lead in first place this month with 786 points to date. This is remarkable given the fact that Kari has been out of commission the past couple of weeks due to surgery. Kari we wish you a speedy recovery, don't worry Marian is not sitting back. She's got everything under control.

Team Purple: - Renee Cooper and Lori Culbertson moved from third to second in the month of February with 403 points.

Team Red: - Pam Wenner and Laura Taylor move into third with 406 points and this is very interesting because right behind them is -

Team Orange: - Mary Claire Corcoran and Stephanie D'Agostino with 403 and that's without MC reporting. These two teams were within three points for the prize last year. The mentors are seasoned pros so let's see what Mary-Claire has been holding back when they report for the month of March. I suspect we may not see these results until after April 15th.

The remaining four teams are racking points each month. Let's see if there will be an upset in the next month..... to be continued.



ASWA MEETING SCHEDULE

| <u>DATE</u> | <u>LOCATION</u> | <u>PROGRAM</u> | <u>SPEAKERS</u> | <u>SPONSORS</u> |
|----------------------------|---|--|---------------------------------------|---|
| Saturday April 25, 2009 | Alice Paul Institute at Paulsdale 128 Hooton Road Mount Laurel, NJ 08054 | Identity Theft and Credit Fraud | Larry Kagan and Teresa Nino | Merrill Lynch |
| Wednesday May 13, 2009 | Ponzio's Diner 7 West Route 70 Cherry Hill, NU 08002 | Containing Healthcare Costs | Terriann Procida and Leanne Cindea | Innovative Benefits Planning, LLC Evesham Capital Management |
| Wednesday June 17, 2009 | To Be Announced | Past Presidents Recognition Installation of Officer | | Becker CPA Review |



The Philadelphia Chapter of ASWA has entered an agreement for alliance with the Greater Philadelphia Chapter of the National Association of Women Business Own (NAWBO) on January 19, 2009. NAWBO's Alliance Mission is to:

- Strengthen the network of women's business owners in the Greater Philadelphia area.
- Create innovative and effective ways to work together with the other groups & associations.
- Build strategic alliances, coalitions and affiliations

The Greater Philadelphia Chapter of NAWBO agrees to do the following for these alliances, and the Philadelphia Chapter of the ASWA reciprocates:

Logo placement on Chapter Website ♦ Access to member database one time per year basis ♦ Program Attendance at member rates - unlimited for members of alliances.

For more information regarding NAWBO and their meeting schedule go www.nawbophila.org



**REPORT OF THE NATIONAL NOMINATING COMMITTEE
SLATED 2009-2010 BOARD OF DIRECTORS**

| | | |
|-----------------|---|---|
| President | Elected in the spring of 2008 for a term starting July 1, 2009 Stacey L. Craig, CPA | Phoenix Chapter |
| President-Elect | To serve as National President in 2010-2011 Vivian L Moller, CPA | Milwaukee Chapter |
| Vice Presidents | Tracy L. Johnson, CPA, AAP Monika P. Miles, CPA Cheryl Willers | San Antonio Chapter Silicon Valley Chapter Flagstaff Chapter |
| Secretary | Berranthia Brown | Atlanta Chapter |
| Treasurer | Catherine A. Mulder, CPA | Ames Chapter |
| Directors | To serve two years, July 1, 2009 to June 30, 2011 Mary Duff, CPA Linda Harris, CPA Barbara Steelman, CMA, CIA, MBA Paula Zanni | Philadelphia Chapter Billings Chapter Orange County Chapter Mesa East Valley Chapter |
| Immediate Past | President Barbara W. Covington | Fort Walton Beach Chapter |
| Directors | Serving the second year of a two-year term - elected in the spring of 2008 to serve until June 30, 2010 Dianna Patton, CPA, CFP Christina A. Polf, CPA Kathryn Sharp, CPA Gina Slack, CPA | Richmond Chapter Seattle Chapter Member-at-Large Des Moines Chapter |

Respectively submitted by the National Nominating Committee:
 Melody B. King, CPA Richmond Chapter
 Anne Christensen Orange County Chapter
 Karen J. Gunther (Chair) Boston Chapter

Uncover the 2nd Tier: Discover Indirect Business Channels

**Are you a woman/minority/
veteran owned business?
Are you familiar with the
term "second tier"?
Do you want to know more?**

**Please join the
Greater Philadelphia
Chapter of NAWBO
on April 17, 2009 at
the Exelon Building
in Philadelphia at
8:00am – 12:00pm.**

We will define second tier supplier diversity. We will explore second tier supplier diversity from different perspectives to uncover maximizing business opportunities for women / minority / veteran owned businesses through a panel of professionals.

**Please go to
www.gonawbophilly.org
to register.**

Program Schedule:

8:00 am – 8:30am: Registration / Continental Breakfast

8:30 am – 9:15am: Opening Remarks & Networking in “ Industry Summit Sectors”

9:15 am – 9:30am: Introductions

9:30am – 10:45am: Panel Discussion

Panel Moderator:

Therese Flaherty, PhD, Director, Wharton Small Business Dev Center, The Wharton School, University of Pennsylvania

Panelists:

Terry Budge, Industrial Specialist and Commercial Marketing Representative, SBA

Curtis Burwell, Bureau of Minority & Women Business Opportunities

Charles Gillean, Program Manager - Supplier Diversity AstraZeneca Pharmaceuticals

Kristin Hickey, National Supplier Diversity Manager, Aetna

PVernice Lewis, Exelon Corp

Paul McLaverty, Procurement Manager, PJM Interconnection LLC

Pamela Y. McMellon-Wells, Supplier Diversity Manager, Rutgers University

Gayle Nuppnau, Procurement Liaison Bureau of Minority & Women Business Opportunities

Rubi Pacheco-Rivera, Office of Economic Opportunity, City of Philadelphia

Clyde Stoltzfus, Director, Southeast PA Procurement Technical Assistance Centers

10:45am – 11:00am: Break

11:00am – 11:50am: Roundtable Break-Out Sessions

Terry Budge & Clyde Stoltzfus: Government Marketing

Curtis Burwell: Getting Certified as Minority and Women Business Enterprises

Charles Gillean: Electronic marketing WEB sites, email and more

Kristin Hickey: How to Leverage Business Opportunities Through 2nd Tier

*U. Harold Levy, Bureau of Minority and Women Business Opportunities:
PA State Certification*

Christine P. Manbeck, MA, ed., President/CEO, Kinley & Manbeck, Management Consulting & Training: Personal 2nd Tier Experiences of a WBENC Certified Business Woman

Paul McLaverty: Leveraging 2nd Tier Business Opportunities in the Small/Medium Size Business Sector

Pamela Y. McMellon-Well: Minority, Woman owned and Small Business Certification - NJ - What does it mean?

Gayle Nuppnau: Doing Business with the Commonwealth of PA

Rubi Pacheco-Rivera: Doing Business with the City of Philadelphia

11:50am: Closing Remarks



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Conference • Industry Discounts

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What is the Alice Paul Institute?

The Alice Paul Institute is a non-profit organization dedicated to educating the public about the life and work of New Jersey's most famous suffragist, Alice Stokes Paul (1885-1977), author of the Equal Rights Amendment, founder of the National Woman's Party, and a lifelong activist for women's equality. API's mission is to educate the public about her life, preserve historic Paulsdale, develop future leaders, and work towards achieving women's equality. Paulsdale, Alice Paul's birthplace and family home in Mount Laurel, is a National Historic Landmark and serves as a center for celebrating women's history and leadership. API was founded in 1985 and today has a membership of over 400 individuals and organizations.

Who is Alice Paul?

Alice Paul was the architect of some of the most outstanding political achievements on behalf of women in the 20th century. Born on January 11, 1885 to Quaker parents in Mt. Laurel, New Jersey, Alice Paul dedicated her life to the single cause of securing equal rights for all women. She founded the National Woman's Party in 1914 and led the first picketers to the White House gates in the name of women's suffrage. When women won the right to vote in 1920, Paul turned her focus to the Equal Rights Amendment (ERA) which she authored in 1923. She worked for women's rights internationally and founded the World Woman's Party in 1938 with its headquarters in Geneva, Switzerland. Paul then succeeded in getting a sexual discrimination clause written into Title VII of the 1964 Civil Rights Act. She lobbied Representatives to pass the ERA from her wheelchair in a nursing home in Moorestown, until her death in 1977. Though the ERA never passed, her legacy lives on through the work of the Alice Paul Institute.

What is Paulsdale?

Paulsdale is on the New Jersey and National Registers of Historic Places. and in 1991 it was designated a National Historic Landmark. The exterior and interior of the house have been restored to their appearance during Alice Paul's residence, with modern accommodations that meet visitors' needs. Alice Paul was born and raised at *Paulsdale*. Her parents purchased the farm in 1883, when it encompassed more than 150 acres of orchards, farm crops and a small dairy herd. The Paul family farmed the land until selling *Paulsdale* in the 1950s. It remained a private residence until API purchased the property in 1990. The c. 1800 farmhouse stands on 6.5 acres of the original property.