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www.afwa.org

PRESIDENT'S MESSAGE

Dear Members and Friends of the Philadelphia Chapter:

As we jump into Fall, we began our fiscal year with **City Food Tours** hosting a tour with the theme "Highlights of East Passyunk," which took us on a tour of 'cutting-edge shops and ambitious restaurants.' Through a walking tour, we explored the incredibly popular neighborhood in South Philly including *Sate Kampar*, *Bing Bing Dim Sum*, *Birra*, *Punk Burger*, and *The Bottle Shop*.

Our meeting this month will be hosted by Rowan University on October 18th, which will be presented by **Jason F. Gabrieli, CFP®** on the topic "**Verify, Verify, Verify.**" Our presenter will discuss ways to protect yourself and clients from investment con artists. We are also welcoming Rowan University students to attend the meeting.

Please remember to register for the **AFWA National Conference in Denver, Colorado** from **October 26-28, 2016** (click [here](#) to register). There is fun and education for everyone at the conference, and you can earn up to 17 CPE credits presented by leaders of the industry. If you are able to make it out early, please sign up for the Foundation's Trivia Night on Tuesday, October 25th (a portion of the donation is tax deductible).

Stephanie S. Sommers, CPA
President, AFWA Philadelphia Chapter

October Meeting Notice

EMPLOYMENT / MEMBERSHIP

Lori Lucente-McKeage, CPA
Diversified Industries, Inc.
121 High Hill Rd
Swedesboro, NJ 08080
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Event: **Verify, Verify, Verify**
1 CPE ~ Other

Presented by: **Jason F. Gabrieli, CFP®**
Investor Coach

Location: **Rowan University,**
Chamberlain Student Center, Room 144
201 Mullica Hill Road
Glassboro, NJ 08028

Date/Time: **Tuesday, October 18 / 6 pm**

Cost: **Members \$ 20**
Non-members \$ 25

RSVP: **Please contact Adrienne Straccione by
end of day, Friday, October 14 by email
afwaphilly@gmail.com**

Verify, Verify, Verify - We'll discuss how even some of the brightest minds have been taken by financial con men and some steps to protect yourself and clients

About our Speaker:



Jason F. Gabrieli, CFP®, Investor Coach
HFM Investment Advisors, Inc.

In his role as Investor Coach Jason provides our clients with more than just an occasional check-in for financial advice. He strives for each client to fully understand their Investment Philosophy, strategy and its impact on their long-term financial well-being. Since 2009, Jason has helped grow our business by improving technology, standardizing processes to improve firm efficiency, presenting financial education workshops and being active in many networking groups and non-profit initiatives.

Having grown up in a family of entrepreneurs, Jason knew from an early age he wanted to be involved in some capacity with business and finance. He realized the beginning of that dream when he graduated from the Robert H. Smith School of Business at the University of Maryland. During his undergraduate summers, Jason worked at HFM as an Intern and found his calling. His studies about Modern Portfolio Theory, Efficient Market Hypothesis and the 3-Factor Model were immediately put to work at HFM. Jason's thirst for knowledge continued as he became a CERTIFIED FINANCIAL PLANNER® in spring 2016.

Jason has been a Rotarian since 2010, most recently with the Glassboro Chapter of Rotary International. He volunteers his time and talents as a fundraiser for the American Cancer Society, MS Society, People for People Foundation and is a member for the Gloucester County Chamber of Commerce Faces of Business and Status Grow committees. Jason was named as one of South Jersey Biz Magazine's top "20 under 40" for 2016.

AFWA National Conference

Elevate

Accounting & Financial Women's Alliance
2016 National Conference
DENVER, COLORADO

Elevate your knowledge. Elevate your connections. Elevate your career..

2016 Accounting & Financial Women's Alliance National Conference

DENVER, COLORADO

Wednesday, October 26 – Friday, October 28, 2016

at the Grand Hyatt in downtown Denver

[Register Now](#)

Early Bird Discount thru Sept 1, 2016

Participation at the National Conference is limited to those registered.

Full registration includes:

- Admission to all sessions (Wednesday, Thursday and Friday)
- Access to the exhibit area
- Wednesday's Welcome Reception
- Group meals and refreshment breaks (*see schedule*)
- Session materials available online

Full registration does not include: Tuesday Pre-Conference Sessions, Student Day, Young Professionals' Day, or

The Foundation's Amazing Race. Passes for these events may be purchased within the registration process.

2016 Registration Fees

FULL CONFERENCE REGISTRATION (<i>Wednesday – Friday</i>)	Through 10/16/2016
AFWA Member	\$675
Non Member	\$925
Student	\$299

Membership Challenge

We are offering a challenge to all our members. To the member who brings the most potential new members to our meetings and converts as many of those potential members to actual members of the AFWA Philadelphia Chapter will win \$50 towards their next dues renewal!!

So, invite your colleagues, associates and friends to become a part of a great organization of fellow accountants and financial professionals. Everybody benefits!



Scholarships

ATTENTION ALL STUDENTS...

Scholarship applications will be available on our website soon, **due in February 2017**. Please apply. The application may be found under the Member Benefits tab > Scholarship Program in the near future.



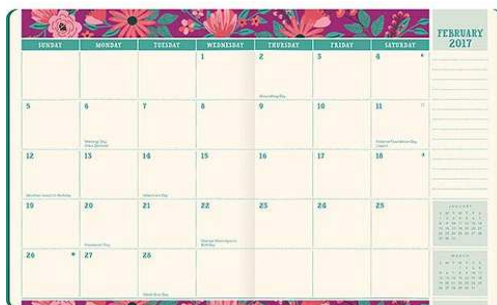
Philadelphia Chapter Scholarship Fund

If you would like to make a contribution or honor someone for a great accomplishment, please think of our Scholarship fund. You may send donations to:

Mary-Claire Corcoran
27 Chelfield Road
Glenside, PA 19038

Please make checks payable to **AFWA Philadelphia Scholarship**. Your contributions will help further the education of a student pursuing a career in accounting or finance. We will also send acknowledgments to your honoree, just send the information.

Here is a listing of our meetings for the upcoming year. Mark your calendars now for the dates. *Topics, locations and dates may be subject to change, so please refer to our website monthly for the most up to date information.*



Calendar of Events 2016-2017

October	Chapter Meeting	Tuesday, October 18 Verify, Verify, Verify 1 CPE-Other Jason F. Gabrieli, CFP, HFM Investment Advisors, Inc. Rowan University, Glassboro, NJ, Chamberlain Student Center, Room 144
November	Chapter Meeting	Thursday, November 17 Whole Life Insurance 1 CPE - Other Location to be determined
December	Social	Date to be announced Social
January	Chapter Meeting	Wednesday, January 11, 2017 Tax Update 1 CPE - Tax Speaker to be determined St. Clair CPA Solutions, Conshohocken, PA
February	Chapter Meeting	Date to be determined Topic to be determined 1 CPE - West Chester University
March		We wish all the best to our members working many hours during tax season. We hope to see you after April 15th.
April	Chapter Meeting	Thursday, April 27 Medicare 1 CPE - Speaker to be determined Ponzio's, Cherry Hill, NJ

Calendar of Events (continued)

May	Chapter Meeting	Wednesday, May 24 Insurance Annuities 1 CPE - Other New York Life Bala Cynwyd, PA
June	Chapter Meeting	Date to be determined Officer Installation / Wine Tasting Location to be determined

Deadline for inclusion in the next newsletter is October 28th

Please forward all submissions to **Jan Spiegel** at jsrspiegel@comcast.net.

Use **AFWA newsletter** in the subject for all submissions please.



Do you know any Accounting or Financial professionals who are not members of AFWA?

This is what you should share with them:

By joining the Accounting and Financial Women's Alliance (AFWA), you can strengthen your professional growth. AFWA offers networking and continuing education with accounting and finance professionals at the local, regional and national levels. Our members communicate both virtually and in-person through online discussion forums, national and regional conferences and chapter meetings.

Benefits of Membership

The following is a list of current benefits enjoyed by members:

- 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 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, Long Term Care insurance and Bank of America credit card.)

If you know of an accountant or financial professional who is not a member, please tell them about us! Have

them go to www.afwa-phila.org and go to **MEMBERSHIP**. Or click to **RENEW-JOIN**.

