



PRESIDENT

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DIRECTORS

Theresa Copeland, MSM
Jan S. Spiegel
Adrienne Straccione, CPA

IMMEDIATE PAST

PRESIDENT

Pam Wenner
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NATIONAL HEADQUARTERS

1-800-326-2163
www.afwa.org

NATIONAL TREASURER

Mary E. Duff, CPA
(member of Philadelphia Chapter)
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PRESIDENT'S MESSAGE

Dear Members and Friends of the Philadelphia Chapter:

I want to start off by letting our chapter's members know that Tracey has decided to officially resign as the President of the Philadelphia Chapter effective immediately. We would like to thank Tracey for all her hard work and dedication to the group during her role as a President and board member and wish her the best of luck. We hope to see her at some future meetings. The board has voted for me to step in as President for the remainder of her term. I look forward to the opportunity and continuing to work with the leadership and members of the Philadelphia Chapter for another successful year!

We would like to thank **Maria Grande** of **Maria Grande, LLC** for providing an enlightening and entertaining discussion on anger and stress management. We were all able to relate the realities of what goes through our minds when we become angry and take that anger out on others. It basically comes down this: It is not worth wasting your energy to stay angry or project your anger onto someone else. There is a lot more involved, but we did have a wonderful and interactive discussion.

Our next meeting scheduled for October 21st will cover the topic of Social Security presented by **Patrick Cahill, CRPC®** of **Allianz Life Financial Services, LLC**. This program is sponsored by Wells Fargo and will provide a high level overview of Social Security benefits and some retirement strategies to help meet long-term financial goals. As we are aware, as our population ages and continue to live longer, social security benefits continue to be an important part of a retirement income package. After years of work, we should be able to look forward to retirement. Choosing when to retire is as important a decision and involves a number of issues to consider for retirement planning. Learn how to take advantage of available opportunities to maximize your benefits.

If you were able to make it to the AFWA National Conference in New Orleans in September, we hope you enjoyed yourselves, made some connections and took away some useful tools. Unfortunately, I was not able to attend but several of our chapter members were. They noted that this was, as usual, a great opportunity to network with other women in accounting and finance across the country. The conference was loaded with opportunities for networking, leadership development and education. And the best part...CPE credits and FUN!

We hope to see you at the next meeting. We encourage everyone to bring a guest to the meetings and enter for a chance to win the next meeting on us.

Sincerely yours,

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
W-856-662-1981 x 107
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NEWSLETTER / WEBSITE

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SCHOLARSHIP

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Judy Maira

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STUDENT NIGHT /

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PROGRAMS

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BY LAWS/ LEGISLATION

Mary Feeney-Bonawitz, PhD, CPA
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H: 570-366-0919

MFBonawitz@verizon.net

Event: Social Security

**Location: London Paris Wine Bar
THE LONDON GRILL + PARIS WINE BAR
2301-2303 FAIRMOUNT AVENUE - PHILADELPHIA,
PA 19130
215.978.4545**

Date/Time: Tuesday, October 21 at 6:00 pm

Cost:

| | |
|--------------------|-----------------|
| Members: | \$ 20.00 |
| Non-members | \$ 25.00 |
| Students | \$ 15.00 |

**RSVP: Please reply by end of day,
Friday, October 14, 2014 by email
afwaphilly@gmail.com**

CPE: 1 hour - Other

Topic: Learn the ins and outs of Social Security – when is the best time to take it, should you file under your spouse, and retirement strategies to help meet long-term financial goals

About our Speaker: Patrick Cahill CRPC®

Regional Vice President, Retirement Consultant Patrick Cahill of Allianz Life Financial Services, LLC has over 12 years of financial services industry experience. He guides financial professionals in creating retirement strategies that help their clients meet their long-term financial objectives, in a variety of market conditions.

Prior to joining Allianz, Patrick held various positions with ING including wholesaling, business development, and sales management. He holds his CRPC designation, along with his Series 26, 6, and 63 securities registrations.

In his free time, Patrick enjoys spending time with family, participating in fitness activities, cooking, and volunteering. He resides in Philadelphia, PA with his wife Kerry and daughter Alexa.

Members' Corner:

Thank you!

Dear AFWA Philadelphia Chapter Members,

Thank you so very much for the delicious *Edible Arrangements* fruit gift you sent me. It arrived Saturday and the selection of fresh fruits was wonderful and much appreciated. I am missing the ability to get fresh fruit and veggies as I still cannot drive, so having this sent to me was a dream come true.

Again, I truly appreciated your thoughtful gesture of the fresh fruit and I hope to see you soon.

Warm regards, Mary

Mary Feeney Bonawitz, PhD, CPA
Retired, Assistant Professor of Accounting
Penn State University

Ed: Mary had knee surgery over the summer and was recuperating. She gave us permission to share her appreciativeness of the Philadelphia Chapter.



Mary-Claire will be participating in an upcoming **Sandwich Generation Information Fair** being held Sunday, October 19th in Maple Glen. The event is aimed at Baby boomers, empty nesters and 40-60-somethings. She will be presenting with her *Family Love Letter* team of Bruce Risler and Mike Connors.

The Family Love Letter: Getting your House in Order Financially, Legally, and Spiritually

Each of us will leave a legacy when we pass, but will it be one of confusion or information? The *Family Love Letter* is a gift of time, love, and clarity...and a roadmap for your loved ones to follow. Meet the experts for a panel discussion of financial, legal and tax "must haves" as you age, and learn how to develop your own *Family Love Letter*.

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
324 Woods Road
Glenside, PA 19038

Please make checks payable to **ASWA 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 and locations may be subject to change, so please refer to our website monthly for the most up to date information. Some dates and locations may be subject to change

Calendar of Events 2014-2015



| | | |
|-----------------|-----------------|--|
| October | Chapter Meeting | Tuesday, October 21 Social Security Sponsored by Wells Fargo The London Grill & Paris Wine Bar |
| November | Chapter Meeting | Tuesday, November 18 Obamacare – Part II Dominic Morrone, Advantage Benefits Concepts, Inc. Location: St. Clair CPAs, P.C. Conshohocken, PA 19428 |

Calendar of Events (continued)

| | | |
|-----------------|-----------------|--|
| December | Social | Friday, December 5 Wine and Dinner – Center City Wine - Campbell & Co Jewelers, 702 Sansom Dinner – Walnut Street Supper Club, 1227 Walnut St <i>** Bring a \$25 gift for exchange</i> |
| January | Chapter Meeting | Wednesday, January 21, 2015 Tax Update Cheryl Post, CPA St. Clair CPAs, P.C. Conshohocken, PA 19428 |
| February | Chapter Meeting | Tuesday, February 17 Section 79 Planning Sponsored by Wells Fargo Wells Fargo Museum or Restaurant |
| March | | We wish all the best to our members working many hours during tax season. We hope to see you after April 15 th . |
| April | Chapter Meeting | Wednesday, April 22 Disability Matthew Sommers, Northwestern Mutual DeVry University, Ft. Washington |
| May | Chapter Meeting | Tuesday, May 19 Wealth Management Jamie DiRenzo, CPA Financial Group Cira Centre, Center City |
| June | Chapter Meeting | Wednesday, June 24 Officer Installation / 75th Chapter Anniversary Wells Fargo Museum |

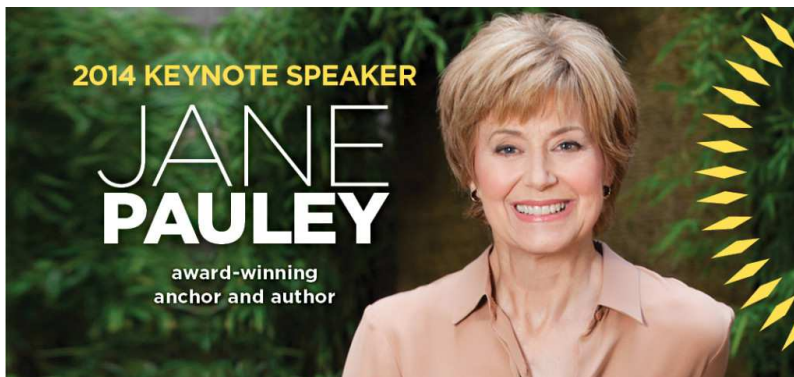
Deadline for inclusion in the next newsletter is October 24th

Please forward all submissions to **Jan Spiegel** at: jsrspiegel@comcast.net.
Use **AFWA newsletter** in the subject for all submissions please.

Upcoming Events



October 16, 2014
PA Convention Center -Philadelphia



For more information and registration, please visit: <http://www.paconferenceforwomen.org/>

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!



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**.

