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**Kristin Culliton**  
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American Society of Women Accountants  
*Philadelphia Chapter*

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

**PRESIDENT'S MESSAGE**

**Dear Members and Friends of the Philadelphia Chapter:**

For those of us that were able to make it, we attended a great tax update meeting. We had a joint meeting with the National Conference of CPA Practitioners, NCCPAP, at Pepper's Italian Restaurant in King of Prussia. NCCPAP arranged for two speakers, Kathleen Fratantoni and James Mahoney from CBIZ to share with us some of the many tax updates that were finally passed at the 11<sup>th</sup> hour. It really was a very helpful meeting as they focused on the changes that will affect many of our clients and maybe us too. Great speakers, great food and great group of people. We'll definitely try to include NCCPAP as we make plans for next year.

As part of our ongoing attempt to increase our meeting attendance, if you aren't attending, please let us know what we could do differently. I would love it if those of you who aren't making it to meetings could reach out to me or other members of the board and let us know what we could do differently that would help or encourage you to attend. Are our meeting topics not relevant to you? Is 1 CPE credit not worth your trip? Would 2 CPE credits be more encouraging? Is the location a factor? Would you prefer a set day of the month? The year passes by quickly and before we know it we'll be planning for next year. It would really be helpful to know what we could do to get you to the meetings. A quick email message would be great. [ASWA-Phila@gmail.com](mailto:ASWA-Phila@gmail.com).

It's more than just numbers to me. I love seeing everyone and strengthening my relationships so we can be great sources of support and encouragement to each other in our professional and personal lives. I really encourage everyone to attend our **February 5th** meeting at **St. Clair CPA's** in Conshohocken with **Shawn Kershaw**, an organizing and productivity coach. I know this topic can be useful to everyone, "**Taking Control of Your Work-Day**". If you can't make it please look at our calendar of events and pick a few meetings or all of them and mark your calendar. I really miss seeing you.

Best of luck for a smooth tax season and when you need a good laugh, watch this video [http://www.youtube.com/watch?v=4v\\_alwa4V\\_Y](http://www.youtube.com/watch?v=4v_alwa4V_Y)

*Pam Wenner*

President of the Philadelphia Chapter

# February Meeting Notice

**NATIONAL DIRECTOR**  
**Mary Duff**

[mduff@duffaccountingsolutions.com](mailto:mduff@duffaccountingsolutions.com)

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**SCHOLARSHIP**

Marian Borzelleca  
102 Woods Rd.  
Plymouth Meeting, PA 19462  
C - 610-745-6659

[mborzellecacpa@gmail.com](mailto:mborzellecacpa@gmail.com)

**STUDENT NIGHT /**

Renee Cooper, CPA  
P.O. Box 1721  
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[renee.coopercpa@hotmail.com](mailto:renee.coopercpa@hotmail.com)

**MENTOR PROGRAM**

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Wawa, Inc.  
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**BY LAWS/ LEGISLATION**

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**Event: Take Control of Your Work Day**

**Location: St. Clair, CPA**  
**101 West Ave**  
**Conshohocken, PA 19406**  
**(610) 265-2416**

**Date/Time: Tuesday, February 5, 2013, 5:30 - 8:00 pm**

**Cost:**

<b>Members:</b>	<b>\$ 20.00</b>
<b>Non-members</b>	<b>\$ 25.00</b>
<b>Students</b>	<b>\$ 15.00</b>

**RSVP: Please contact Pam Wenner by end of day,  
Monday, February 4, 2013 by email**  
[aswaphilly@gmail.com](mailto:aswaphilly@gmail.com)

**Topic:** The workforce is more complex than ever before, individuals are being asked to do more with less. This high-energy, fast-paced program is designed to introduce tools to purposefully track essential activities and cement techniques to get it all DONE! Mastering just five basic principles will empower every aspect of your professional and personal life.

- **Establish** a master tool to seamlessly identify and follow up on outstanding tasks for maximum achievement.
- **Build** a time management system that brings all the facets of your life into one trusted location.
- **Learn** to focus on those activities which produce the "biggest bang for your buck."
- **Create** a blueprint to implement changes based on the **Organizing by Degrees™** principle, the process of tackling one challenge at a time with a step-by-step focus on specific objective, collectively setting you on a life changing course.

## About our Speaker:

**Shawn Kershaw**  
Organizing & Productivity Coach

**Shawn Kershaw, Inc.** provides corporate clients with the fundamental skills to make the best use of their time, simplify and coordinate tech tools to process the crushing amount of information, and effectively manage open "loops." This knowledge allows them to live fuller, richer lives because of the freedom and harmony that living an organized professional life can bring.

Shawn Kershaw, Inc. has provided consultation services for organizational issues since 1994. The company is an expert at discovering the barriers and challenges to productivity and then offering customized, targeted solutions. Shawn Kershaw Inc. has delivered customized personal productivity training seminars to thousands of participants in scores of corporations. A key to the success of these seminars is the customization of content to reflect both the company's structure and culture.

Organizing and productivity consultation is the perfect vehicle for Shawn to bring all the facets of her work experience into play, including her experience as a teacher and her years in the investment banking industry. Her strengths include not only her skilled teaching techniques but also the passion, energy and humor she brings to her working sessions.

Shawn is a founding member of the Greater Philadelphia Chapter of the National Association of Professional Organizers (NAPO). She has served as president, vice president, and program chair of that organization. She currently serves as the Specialty Interest Group Committee Chair. In 2005, Shawn was the recipient of the NAPO President's Award for her committee's outstanding work to NAPO chapters.

Shawn is a member of the National Speakers Association. She serves as the secretary for the NSA Philadelphia. She is certified as a woman-owned business by the Women's Business Enterprise National Council.



We want to thank our sponsors for a successful Student Night in September.

### Gold Sponsors for Student Night:



### Silver Sponsors for Student Night





## Greater Philadelphia Chapter Q&A with IRS Senior Stakeholder Liaison Richard Furlong and Federal Tax Update with CPA Panel (704200)

**Thursday, February 07, 2013, 8:00 AM to 12:00 PM**

Facility: Spring Mill Manor  
171 Jacksonville Rd  
Warrington, PA 18974

CPE Credit TX - 4.0  
Level of Knowledge Basic  
Price: Member: \$45.00 - Non-member: \$65.00

Join the Greater Philadelphia Federal Tax Committee for a program featuring Richard Furlong, IRS Service Senior Stakeholder Liaison, and an expert panel of tax practitioners

### **Highlights:**

- Current Federal Tax Issues
- American Taxpayer Relief Act of 2012
- Medicare Surtax for 2013
- Affordable Health Care Act (Obamacare)
- New Forms 8937
- State Tax Law Changes

### **Schedule:**

- 7:30 a.m. - Registration and Networking Breakfast
- 8:00 a.m. - 12:00 p.m. - Program

Firm administrators should login first to register group. [Login](#)

**CBIZ will be providing free copies of CCH's "Top Federal Tax Issues for 2013" to the first 100 attendees**

**DIRECTIONS TO SPRING MILL MANOR (please note some GPS devices do not have correct address, and require you to enter Warminster as the city location).**

Thank you to our sponsors **Monument Bank, ADP and Corpco.**

**This course qualifies for 3 substantive CLE credits.**

## A preview of our April meeting: Connecting the Dots to Success ...with Marilyn Kleinberg

- 1) Networking is understanding the art of conversation—be prepared to chat with people about current events, family, hobbies, sports, etc.
- 2) Networking is finding commonalities and building relationships.
- 3) Your 30 second elevator speech should leave them asking you for more information. Create a call to action that engages them in your business.
- 4) Have different introductions depending on the group or your needs that day.
- 5) Don't sound rehearsed. Be authentic.

If you want to see all top 20 networking tips, then please join us on Thursday, April 25 at Ponzio's in Cherry Hill.

## • Members Corner œ

### We have more CPA's in the area:

Congrats to **Katie Williams** and **Katrina Smith** who have completed their experience requirements and have now become full-fledged CPA's. What's next on their accomplishment list? **"I am going for my Masters of Taxation"** says Katie. **"Taking my first class during busy season make me nervous but I have a couple of co-workers who told me the first class is the easiest and to take it during busy season. I am looking forward to getting more in-depth knowledge regarding taxes and think it will be good for my career."** By the way, Katrina is also attending Villanova for her Masters of Taxation.

Congrats to **Stephanie D'Agostino** who just recently passes her final part of the CPA exam. "I'm soooo happy, it's such a huge weight off of my shoulders"

### The Bragging Corner::

**Just to brag a little. . . .Margarita Stanislavskaya's** daughter, **Katya**, won an award for Best Original Music among PA theater companies for her original score and song for "Much ado about nothing" of Shakespeare.

Please see the Link below: she is under "Best Sound Design/Original Music" category.



<http://broadwayworld.com/article/2012-BWW-Philadelphia-Awards-Winners-Announced-Dann-Dunn-Gets-Two-Wins-20130115#ixzz21xqAyhjG>

This is your last chance for a 2013 Tax Update. Mention you're an ASWA member



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**Details:**

**Date: February 13th**

**Time: 11:30am - 1:30pm**

**Location:** Northwestern Mutual-  
Eastern Pennsylvania  
1000 Continental Drive, Suite 695  
King of Prussia, PA 19406

**Lunch sponsored by Northwestern Mutual**

**R.S.V.P.**

For More Information or to RSVP for this event, please call: **Joan Winchester**  
**610-225-6541** or email at [joan.winchester@nmfn.com](mailto:joan.winchester@nmfn.com) .

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Cindy Dicciani

Investment Advisory Representative, Dicciani Financial Group, Inc.  
President of WIFS, Philadelphia/TriCounty

Joan Winchester

Director of Professional Recruitment, Northwestern Mutual-Eastern Pennsylvania  
Vice President of WIFS, Philadelphia/TriCounty

## Tax Forecast 2013 Luncheon

### What Clients Need to Know

Become a more valued resource, trusted advisor as you gain insight as to how the new tax changes will affect your clients and their families. Hear from two top female tax experts from ParenteBeard as they present information you can share.

Sincerely,

Joan Winchester

Northwestern Mutual Eastern Pennsylvania  
Vice President of Women in Insurance and Financial Services  
Philadelphia/Tri-County Chapter

### Speakers:

***Kimberly A. Dula, CPA. Partner, Philadelphia Office***

Kim began her career with ParenteBeard 20 years ago as an intern and has advanced to become a partner. She provides tax planning and compliance services for many of the firm's high net worth tax clients and their closely held business. Kim's previous experience includes preparations and review of various tax compliance filings, the implementation of employee benefit plans and related compliance issues and consulting and compliance services in the areas of estate, gift, and trust. Her management experience includes the supervision, professional development and training of staff, as well as the implementation of various tax department policies and procedures.

**Kelly Trzeciak, CPA, Senior Manager, Philadelphia Office ParenteBeard**

Kelly has been a member of the firm's exempt organization tax practice since 2002. She is responsible for the coordination and supervision of tax compliance and consulting issues the involve our exempt organization clients, which include health care systems, acute care hospitals, skilled nursing facilities, home health and hospice agencies, continuing care retirement communities, higher education institutions and membership organizations. Kelly also concentrations on tax compliance involving on employee benefit plans, for profit entities and individuals.



## Calendar of Events

2012-2013



March	Chapter Meeting	Winter break/Tax season No meeting
April	Chapter Meeting	Thursday, April 25 <b>Connecting the Dots to Success</b> Marilyn Kleinberg Ponzio's @ Ellisburg Circle, Rts 70 & 41 Cherry Hill, NJ



**Deadline for inclusion in the next newsletter is March 15th**

Please forward all submissions to Jan Spiegel at: [jsrspiegel@comcast.net](mailto:jsrspiegel@comcast.net).

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

# Our Affiliations

Did you know that we have affiliations with NAWBO, WIFS, ALPFA as well as the other companies you see here ? What does this mean you may ask? By being an affiliate of these professional women's groups, it allows us, the members of ASWA-Philadelphia Chapter to attend their meetings at their member cost, to expand our networks, professionally and personally to help us grow. To know more about them and see their meeting schedules, please check out their websites. It also allows us discounts to the CPA review courses and other benefits to the other affiliates (just click on their icons to go to their websites):



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## 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. We will also send acknowledgments to your honoree, just send the information.



## Upcoming Events and Conferences.....

Greetings Southeast and Northeast Regional Chapters

I hope you have the May 3-4, 2013 dates blocked off to attend the 2013 ASWA Southeast Regional Conference to be held in Richmond Va. We think it is going to be a good one.

We are looking for speakers in the personal development area and Audit/accounting area. If you know of some good speakers that would be willing to travel to Richmond VA to attend the 2013 Regional conference at a discount and present, please let me know.

Finally, watch for additional information on the 2013 ASWA Southeast Regional conference. Let me know if you have any questions or comments.

Kay Gotshall  
ASWA Co chair 2013 Southeast Regional Conference  
804-273-6223  
[kgotshall@keitercpa.com](mailto:kgotshall@keitercpa.com)



## Do you know Accountants who are not members of ASWA?

### This is what you should share with them:

By joining the American Society of Women Accountants (ASWA), you can strengthen your professional growth. ASWA 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 ASWA'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 who is not a member, please tell them about us! Have them go

to [www.aswa-phila.org](http://www.aswa-phila.org).  
blue seal at the bottom of the page that says



Click on **MEMBERSHIP**. Click on the

**RENEW-JOIN**.