

January 2013  
Philadelphia Chapter  
Volume 62 Number 4

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*Philadelphia Chapter*

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**PRESIDENT'S MESSAGE**

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

December is for celebrating the holidays and I hope you get the chance to spend time with your family and friends enjoying the special decorations and traditions. May your holiday season be merry and bright. Earlier this month, a few of us got the chance to see Peter Nero and the **Philly POPS**. And adding to the special show, our chapter member, **Jane Rose**, is a member of the Holiday POPS Festival Chorus. We started with a great lunch at Valanni Social and then a short stroll to the Kimmel Center for a fabulous program. It was truly uplifting and fun. They even performed a rendition of Gangnam Style.

Now that we're coming to the end of the year, it's time to start thinking about taxes. There are many changes this year that make a tax update program necessary for everyone. We've made plans to have a joint meeting with the **National Conference of CPA Practitioners**. They have arranged for speakers from CBIZ to meet with us on **Wednesday, January 9th** at Peppers Italian Restaurant in King of Prussia. We will have dinner and a **2 CPE** credit program will be provided. Don't forget to RSVP. I hope to see everyone there.

The shock and grief that comes out of Newtown, CT has affected the entire country and leaves a heavy heart as we think of the innocent victims and their families. As I'm sure many of you have experienced since December 14<sup>th</sup>, I have had many moments of overwhelming sadness for the unimaginable violence. It's a shame that sometimes it takes such an event to spur us to express our feelings, but I want to take the time to tell you all how much you mean to me. My ASWA friends are beautiful women, who have shown me support and kindness, loving concern and excited pride. I want to express how important all of you are to me and that you all have a special place in my heart.

All the best wishes to you for a Happy New Year!

*Pam Wenner*

President of the Philadelphia Chapter

# January Meeting Notice

## A joint meeting with the National Conference of CPA Practitioners

### NATIONAL DIRECTOR

Mary Duff

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### MENTOR PROGRAM

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**Event:** Tax Update

**Location:** Peppers Italian Restaurant  
239 Town Center Road  
King of Prussia, PA 19406  
(610) 265-2416

**Date/Time:** Wednesday, January 9, 2013 : 5:30 - 8:00 pm

**Cost:** includes 2 credits of CPE  
Members: \$ 35.00  
Non-members \$ 35.00  
Students \$ 35.00

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

**Topic:** We will be reviewing various changes in all areas of federal taxes.  
Don't miss this important meeting!

### About our Speakers:

**Kathleen M. Fratantoni, CPA**  
Manager, Mayer Hoffman McCann P.C.  
Manager, CBIZ MHM, LLC

Kathleen Fratantoni is a Manager in the Tax Department of CBIZ MHM, LLC. Mrs. Fratantoni brings over 29 years of experience in tax and accounting services to her role in the organization. Her areas of professional experience include federal, international, state and local taxation, accounting and auditing, estate and financial planning. Kathleen has been a Certified Public Accountant in Pennsylvania since 1986.

Mrs. Fratantoni worked in a regional public accounting firm from 1983 until 1991. She was a controller for a closely held company in West Chester from 1991 to 2002, where she was responsible for the accounting and tax returns for the family's multiple businesses and tax reporting. Kathleen became a sole tax practitioner from 2002 until 2006. In 2006 she became a manager at CBIZ MHM LLC where she continues as a tax department manager.

Kathleen received her Bachelor of Arts in Business Administration from Cabrini College in 1981. She also received her Master of Science in Taxation in 1984 from Widener University.

About our Speakers continued from page 2

**James D. Mahoney, CPA**

Manager, Mayer Hoffman McCann P.C.  
Manager, CBIZ MHM, LLC

Jim Mahoney is a Manager in the Tax Department of CBIZ MHM, LLC. Mr. Mahoney brings over 30 years of experience in tax and accounting services to his role in the organization. Jim Mahoney’s areas of professional experience include federal, state and local taxation, accounting and auditing, estate and financial planning. Jim has been a Certified Public Accountant in Pennsylvania since 1981.

Mr. Mahoney was an Internal Revenue Agent for the U.S. Treasury Department from 1967 to 1987. Thereafter, he helped establish the firm Brennan & Mahoney, P.C. until 1997. He then became a sole proprietor in 1997 until 2001. In 2001 he became a manager at Jones, Hayward, Wielgus, McNally & Lenzi, LLC which merged into CBIZ Accounting, Tax & Advisory LLC in 2002 where he continues as a tax department manager.

Jim received his Bachelor of Science from St. Joseph’s University in 1974. He also received his Master of Science in Taxation in 1987 from Widener University.



**We want to thank our sponsors for a successful Student Night**

**Gold Sponsors for Student Night:**



**Silver Sponsors for Student Night**



## Members Corner

Our Membership Chair, Lori McKeage has been a busy bee these last few months. She has signed up several new members. Please meet some of them below and please be sure to say hello to them at our next meeting:

**Angella Min** is a graduate of the University of Pennsylvania. After graduating, she pursued a career in Financial Services and Investments. She has worked for Fidelity Investments, Charles Schwab, and Morgan Stanley. At her last investment-related position, she was the Director of Financial Planning for a wealth advisory firm, SingerXenos Wealth Management, based in Coral Gables, FL. During that time, she was a licensed Certified Financial Planner (CFP), a Chartered Financial Consultant (ChFC), and an adjunct professor at the University of Miami's Continuing Education Department. She has also passed Level 1 of the Chartered Financial Analyst (CFA) credential.



Currently, Angella is pursuing her Masters in Accountancy, with concentrations in Forensics and Valuation, through Florida Atlantic University's Executive On-Line Masters Program.

Angella has been a resident in Philadelphia, New York City, East Bay San Francisco, Miami, and Seoul, South Korea. Presently, Angella lives in the Philadelphia suburbs with her son. Their favorite activities include: exploring local parks, reading books, making crafts, experimenting in the kitchen, and laughing.



**Karianne Tomosky** is a licensed CPA and a Senior Audit Associate at CBIZ MHM, LLC. Karianne's areas of professional experience include planning and executing accounting, and attest engagements for publicly-held companies, nonprofit organizations as well as privately held owner-operated companies. Karianne also has experience in providing attest services for employee benefit plans. She has experience servicing clients in the manufacturing, distribution, technology, media, food-service, and construction industries. Karianne received her Bachelor of Science in Accounting from Philadelphia University. She has been a Certified Public Accountant in Pennsylvania since 2011 and is a member of both the American and the Pennsylvania Institute of Certified Public Accountants.



**Dawn Finley** is a sole proprietor in Maple Glen, PA under the name of Dawn Finley and Associates. Dawn has been a sole proprietor for 7+ years and has worked in finance, accounting and tax for 17 years. She received her B.B.A. at Temple University, receiving her Accounting degree in August 1995



Dawn is a member of the National Association of Registered Tax Preparers, National Association of Tax Professionals and the National Association of Certified Public Bookkeepers. She can now add the American Society of Women Accountants to that list.

Welcome to the Philadelphia chapter Angella, Karianne and Dawn. Let's all please be sure to say hello when we see our new members.



**The Officers and Board of the Philadelphia Chapter of ASWA**

**Would like to extend warm wishes to you and your family during  
this**

**Holiday Season**



## Calendar of Events 2012-2013



<b>February</b>	Chapter Meeting	<b>Tuesday, February 5</b> <b>“Take Control of Your Work-Day”</b> <b>Shawn Kershaw</b> Organizing & Productivity Coach St. Clair CPA Conshohocken, PA
<b>March</b>	Chapter Meeting	<b>No meeting</b>
<b>April</b>	Chapter Meeting	<b>Thursday, April 25</b> <b>“Becoming a Better Networker”</b> <b>Marilyn Kleinberg</b> Ponzio’s @ Ellisburg Circle, Rts 70 & 41 Cherry Hill, NJ



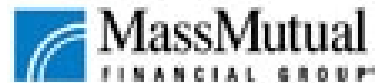
**Deadline for inclusion in the next newsletter is January 15th**

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):



## 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).



Click on **MEMBERSHIP**. Click on the blue seal at the bottom of the page that says **RENEW-JOIN**.