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American Society of Women Accountants
Philadelphia Chapter

www.aswa-phila.org

PRESIDENT'S MESSAGE

Dear Members and Friends of the Philadelphia Chapter:

The views at the Pyramid Club are spectacular. I'm sorry not everyone could make it to our May meeting. It was a pleasure joining the Pyramid Club's Professional Women's Committee. We had the opportunity to do some speed networking with some new professionals. We moved from one small group to another, enabling us to meet more people than we may have otherwise. I wouldn't mind trying that again.

Ken Marblestone from The MandMarblestone Group joined us to speak about Retirement Plans. I found it helpful to understand that there are many options available for companies big and small. Sticking to the "cookie cutter" plans that are often offered can limit what the owners can contribute for themselves and for their employees. It reminded me how important it is to speak to a specialist before getting a new retirement plan started. Following Ken was Bronwyn Martin from Ameriprise Financial. Bronwyn focused on the importance for women to have an understanding of their finances. Some women leave the financial planning to their husbands and only when they become widows or they're going through a divorce do they find the need to be involved and understand what they have and what they need. Women can do themselves a disservice if they don't take the opportunity to review their own financial situation.

Next month is our year end meeting and this year we're going to the Conservatory of the West Laurel Hill Cemetery in Bala Cynwyd. Laurel Hill is more than just a cemetery. It's an outdoor sculpture garden, a horticultural gem and a truly unique historical place. Don't miss a chance to socialize with your fellow members as we finish out the year with a bang. I'm happy to be honoring our fellow members that have been dedicated to our organization for more than 25 years. We will be recognizing each of them for their loyalty and commitment. We'll also be presenting a check to our scholarship winner, Jenny Vu and finally the installation of our 2012-2013 Officer's. I'm looking forward to a nice evening.

I can't thank everyone enough for all the support and encouragement that I've received as I took on the role of President of our chapter. I look forward to my sophomore year and hope my leadership can help our chapter grow.

Please mark your calendar for our annual planning meeting, **Saturday, July 21st**, 9am at our Treasurer, Mary Claire Corcoran's home. We need everyone's help to plan an exciting year. If you're not able to attend, please send me any ideas or suggestions.

Thank you again for a wonderful year!

Pam Wenner

President of the Philadelphia Chapter

June Meeting Notice

EMPLOYMENT / MEMBERSHIP

Lori Lucente-McKeage, CPA
Diversified Industries, Inc.
121 High Hill Rd
Swedesboro, NJ 08080
W-856-662-1981 x 107
C-609-504-8956
seagem.llm@comcast.net

NEWSLETTER / WEBSITE

Jan Spiegel
1854 Lippincott Road
Huntingdon Valley, PA 19006
H-215.947.8617
jsrspiegel@comcast.net

SCHOLARSHIP

Marian Borzelleca
102 Woods Rd.
Plymouth Meeting, PA 19462
C – 610-745-6659
mborzellecacpa@gmail.com

STUDENT NIGHT / MENTOR PROGRAM

Gwendelyn L. Ruff
Talent Acquisition Supervisor
Wawa, Inc.
260 W. Baltimore Pike
Wawa, PA 19063
610.908.5464
Gwendelvn.Ruff@wawa.com

BY LAWS/ LEGISLATION

Mary Feeney-Bonawitz, PhD, CPA
Penn State University
200 University Dr, A-122
Schuylkill Haven, PA 17972
H: 570-366-0919
W: 570-385-6085
MFBonawitz@verizon.net

Event: Annual Installation of Officers for 2012-2013

Location: The Conservatory at West Laurel Hill Cemetery
225 Belmont Ave,
Bala Cynwyd, PA 19004
(267) 991-0048

Date/Time: Tuesday, June 12, 6:00pm

Cost: \$ 30.00 (Your welcome to BYOB)

RSVP: Please contact Pam Wenner by end of day,
Monday, June 11, 2012 by email
aswaphilly@gmail.com

Program:

Recognition of members with 25+ years
(See list below with some bios from our
honored members)

Presentation to our 2012-2013 Philadelphia
Scholarship winner, Ngoc (Jenny) Vu

Installation of the 2012–2013 Slate of Officers
for the Philadelphia Chapter (#6)

More on our esteemed 25+ Year Members:

Mary Elizabeth Scout member since -12/1/1967

Mary is a graduate of Drexel University and her co-op job lead to her first full-time position at Price Waterhouse in 1965. Mary first took an executive role in the Philadelphia Chapter in 1971 as recording secretary. She served in all executive positions leading to president of the chapter from 1975 to 1977 and then reprised the position again in 1979, when the president, at the time, passed away.

Joyce Lunney member since - 2/1/1976

Joyce served as President of our chapter from 1980 to 1982.

Ilene McCaffrey member since - 5/1/1977

Ilene served as President of our chapter from 1982 to 1984.

Karen Facer-Mee member since - 3/1/1980

Though Karen hasn't held an officer position with the chapter, she has been a devoted member. Karen is a Past President of the Greater Philadelphia Chapter of the PICPA and has served that organization in various positions since May of 2003.

A graduate of Temple University in 1983, Karen began her career in accounting as a Para-Professional at Kreischer, Miller, in Horsham, PA (while attending Temple). She obtained her CPA in 1984 and was later promoted to Manager. In 1990, she left the firm to found a Sole Proprietorship, as Karen C. Facer-Mee, CPA, in Warrington, PA. Since 1995, Karen has held the position of President of Facer, Mee & Associates, P.C. in Ivyland, PA.

Linda Chicano member since - 4/1/1980

Linda has been a Certified Public Accountant for over thirty years. She graduated Drexel University, where she received her Bachelor's Degree. She passed the CPA exam in 1972, and has worked exclusively in public accounting ever since. Along with ASWA, her affiliations include the AICPA, PICPA, PSPA. She served as President of the Philadelphia Chapter from 1984 to 1986 and was a board member for several years. She is also on the board of PSPA.

Marilyn Vito member since -12/1/1982

Marilyn Vito has served on the chapter board from 1984 to 1989, including chapter president from 1986 to 1988. In 1987, Marilyn joined the National Board of Directors and eventually served as National President in 1992-93.

Marilyn Vito holds a B.S. from Richard Stockton College of NJ, an MBA from Monmouth College/University and completed Stonier Graduate School of Banking at the University of Delaware. She is a licensed CPA in New Jersey and Pennsylvania and is also a certified management accountant (CMA).

Mary Bonawitz member since - 1/1/1983

Mary has been a member of ASWA since 1983, starting with the Albany, NY Chapter and also serving as President of the Fort Walton Beach, FL Chapter. Mary actively participates as the By-Laws Chair for the Philadelphia Chapter. Besides serving as 2002-2003 ASWA National President, she served on the Subcommittee for Professional Ethics for the American Institute of CPAs, and on the Sole Practitioner's Committee of the Florida Institute of CPAs. She is also a member of the American Accounting Association, Pennsylvania Institute of CPAs, and American Woman's Society of CPAs. Dr. Bonawitz

holds a PhD in Accounting from Florida International University in Miami and a BS and MS in Accounting from the State University of New York at Albany. She is a licensed CPA in Pennsylvania, Florida, New York, and the US Virgin Islands.

Sharon Greenberg member since - 1/1/1983
Sharon served as President of our chapter from 1992 to 1994.

Alice Gorman member since - 2/19/1985
Alice received her degree from Richard Stockton College of New Jersey in 1984. She achieved her CPA in 1986 and is a member of the NJSCPA. She started her career in the tax department of Arthur Andersen. Alice also worked at Wheaton Industries in Millville, NJ and Atlantic City Electric Company in Pleasantville. Currently she is the Office Manager for Road Safety Systems, LLC in Vincentown, NJ. Alice has served in various positions in the Philadelphia Chapter, including President from 1990 to 1992, Northeast Area Director and National Nominating Committee.

ASWA highlights - my first student night, the Cosmopolitan Club, I was the President when we hosted the Northeast Area Conference in 1993, the PE building had our name up in lights for the conference thanks to Dot Lyons, many great memories from road-tripping to Northeast Area and National Conferences with a car full of chapter members, especially the whale watch during the conference in Cape Cod, was present when Marilyn Vito was installed as President of National in Anchorage, AK, many Summer planning meetings, especially the one I hosted during a torrential downpour when water poured into my basement!

I joined the Philadelphia Chapter as a student in order to network to obtain employment. I stayed because I loved it - the meetings, the members, the conferences, etc.

Lori McKeage member since -11/19/1986
Lori is a graduate of Drexel University and a CPA. Along with a number of years in the public sector, she was the VP and Treasurer of AC Moore for more than 17 years and currently works as the Controller for Diversified Industries in Swedesboro, NJ. Lori has served in many positions for the Philadelphia Chapter, including President from 2007-2009. Lori is currently our Employment & Membership Chair.

Jane Rose member since - 2/2/1987
Jane A. Rose is Vice President of RTD Financial Advisors, Inc. and has been with the firm since 1989. A graduate of Rutgers University with an MBA from Temple University, Jane Rose is a CPA with more than 25 years of financial planning and management experience. She has been awarded the Personal Financial Specialist (PFS) designation granted by the American Institute of Certified Public Accountants (AICPA); the PFS designation is held by less than one percent of CPAs nationally. As a corporate professional member of the National Association of Personal Financial Advisors (NAPFA), she offers fee-only services. Also, she is a Certified Management Accountant, holds the CERTIFIED FINANCIAL PLANNER™ designation, and is listed in Who's Who in America, Who's Who in Finance and Business, and Who's Who of American Women.

Active in professional and community service organizations, Ms. Rose is a member of the AICPA, AWSCPA, NJSCPA, and FPA. She is past president of the Board of Contact Community Helplines and currently serves as its treasurer. Also active with WOMEN'S WAY, she has been recently named Volunteer of the Month.

We couldn't be more proud of our treasured 25+ year members. Their continued support to the Philadelphia Chapter deserves admiration and respect. They will always be appreciated.



And the winner is.....



NGOC (JENNY) VU

We would like to congratulate Jenny for being selected as our 2011-2012 Scholarship winner. Jenny has just completed her Junior year at Drexel University with an expected graduation of September 2013. Jenny, originally from Vietnam, lives in Philadelphia with her family.

Her accounting grade point average is 4.0, with an overall grade point average of 3.65.

Jenny's Honors and Awards Received include:

Eastern Region Student Conference Scholarship, National Association of Black Accountants; **Dean's Scholarship and Deans List**, Drexel University, and **The Wilbur and Burdella Stuckey Carl Mathematics Prize**.

Many of Jenny's extracurricular activities and offices held include:

ASCEND – Pan Asian Leaders: *Member*; **National Association of Black Accountants, Drexel Chapter:** *Director of Corporate Relations*; **Drexel Entrepreneur Association:** *Vice President of Communication*; **Drexel Vietnamese Students Association:** *External Vice President*; **Campus Activities Board**, Performing Arts Committee: *Executive Member* and **IRS Volunteer Income Tax Assistance Program (VITA)**, *IRS-certified Tax Preparer*

An excerpt from Jenny's essay:

The co-op programs and networking opportunities at Drexel provide me valuable internship opportunities. Those internship experiences complement my studies at Drexel, sharpen my technical skills and broaden my knowledge in the accounting field. I completed a six-month internship at KPMG last year. I am currently working as a seasonal tax associate at PricewaterhouseCoopers and I will do an audit internship at Deloitte this summer. During my internships, I put my great efforts to complete my job duties and go beyond job expectations. My long-term goal is pursuing a MBA degree and becoming a Partner in a public accounting firm. In addition, I want to take the most advantage of my college time to help my student organizations grow bigger and stronger. As a Director of Corporate Relations for NABA student chapter at Drexel and a Vice President of Communication for Drexel Entrepreneurs Association, I am responsible to network and build up connections with recruiters and accounting professionals to explore development opportunities for my organization.

She will be presented with the Scholarship at our June closing meeting. Please be sure to attend to congratulate her!



A new year, a new slate of officers for the 2012-2013 year

President
President Elect
Treasurer
Secretary

Pam Wenner
Tracey Bond-Wright
Mary-Claire Corcoran
Judy Maira

Directors

Theresa Copeland, MSM
Marian Borzelleca
Stephanie Sommers
Jan Spiegel

Immediate Past President

Renee Cooper, CPA

Chairpersons:

By-Laws/Legislation
Financial Literacy
Employment/Membership
Newsletter/Publicity
Scholarship
Student Events
Website

Mary Feeney-Bonawitz, PhD., CPA
Mary-Claire Corcoran
Lori McKeage, CPA
Jan Spiegel
Marian Borzelleca
Gwen Ruff
Jan Spiegel

If you are interested in serving on one of these committees, please email Pam Wenner at pwenner@bkicpa.com, to express your interest in being on the team for next year. The best way to get involved is to serve on a committee.

This is where the organization enhances its goal to "Empower Successful Women". ASWA offers opportunities for our members to take on various leadership roles. This a valuable benefit of your membership because you'll assume responsibilities with the support and encouragement of valued friends. By attending the June meeting you will have an opportunity to speak with many members that can share with you that their experience with ASWA has enabled them to be more prepared for many of the accomplishments in their lives. Don't miss out!



Support for our Unemployed Sisters of the Philadelphia Chapter

Application Form

I'm happy to report that the board has decided to assist our loyal, dedicated members who have found themselves on the unemployed rolls. Starting in May of 2012, for those members that qualify, the Philadelphia Chapter of ASWA will assist our members by covering the costs of the National annual dues. The member will still be responsible for the local chapter dues. Candidates must have been a member for at least 5 consecutive years and have participated on a committee. This includes the Mentor Program or a position on the Board. All applications can be sent to our Membership Chair, Lori McKeage via email (seagem.llm@comcast.net). All applicants will be kept confidential between the Membership Chair and Treasurer. It will not be shared with the board or general membership. A member may be supported for a maximum of two years but reapplication is required for the second year. A maximum of five members will be granted support in any one year.

Pamela Wenner
Philadelphia Chapter President

Applicants Name _____

Applicants Email _____

Original Date of Membership _____

First Date of Unemployment _____

Company and Title of Last Employment _____

*Address where the National dues reimbursement should be mailed

Membership Chair Signature _____ Date _____

Treasurer Signature _____ Date _____

* We ask that you renew your dues online with a credit card and we will mail you a check for the National portion of your dues.

New Alliance

Dear ASWA Members,

As part of our ongoing effort to increase the value of your ASWA membership, and because of your National Board's commitment to fostering diversity within our organization, ASWA has formed an alliance with ALPFA, the largest, oldest, and fastest growing Latino association for business professionals and students. As part of this alliance, ALPFA is offering complimentary, one-year memberships to the first 250 ASWA members who sign up! (Please note that this membership promotion does not apply to ASWA members who already hold an ALPFA membership.)

Did you know that ALPFA has over 19,000 members in 40 chapters across the country and like ASWA, they offer many wonderful opportunities for networking, leadership and professional development? Some of our ASWA chapters have already discovered this and have developed joint programming with ALPFA at the local level. Thus, we are excited to provide you with a connection to ALPFA on a national level as well.

If you are interested in taking advantage of this great opportunity to join ALPFA and learn what they have to offer you, we encourage you to peruse the link below to select a chapter close to you. To sign up, simply follow these directions:

- 1) Go to <http://www.alpfa.org/join>
- 2) Select the chapter you wish to join
- 3) Complete the member registration form and select General One Year Membership
- 4) On the final payment screen, enter the discount code: **ASWA2012**

ALPFA's 40th anniversary celebration will be held in Las Vegas during their Annual Convention August 11-16. All ASWA members are welcome to attend. For more information, [click here](#).

All the Best,

Lee Lowery
ASWA Executive Director

Our Affiliations

Did you know that we have affiliations with NAWBO and WIFS? 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:

gonawbophilly.org



phillywifs.org



womenintheboardroom.com/event-cities/philadelphia



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.



Calendar of Events

2011-2012



June	Chapter Meeting	Tuesday, June 12th The Conservatory of West Laurel Hill Cemetery Installation of new officers Roll Call and Pin presentation of 25 yr members Scholarship presentation to winner, Jenny Vu
July	Planning Meeting	Saturday, July 21th, 9:00 am Home of Mary Claire Corcoran 324 Woods Road, Glenside, PA 19038 Please plan on attending. Bring your topic ideas and speakers. This is where YOU have a chance to be heard. All are invited.



Deadline for inclusion in the next newsletter is July 30th

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

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