

May 2009
Philadelphia Chapter
Volume 58 Number 8

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PRESIDENT'S MESSAGE

Dear Members and Friends of the Philadelphia Chapter:

Saturday's meeting truly reinforced my continued commitment to ASWA. It was the combination of the setting, the sponsors and the members and guests who assembled on our first truly beautiful Saturday of the year.

First, the Alice Paul Institute at Paulsdale in Mount Laurel, NJ is a fine historical experience alone. The informative video and guided tour left seasoned members asking "why haven't I been exposed to this in my past educational journey?" If you were unable to join us, it is worth your while to visit www.alicepaul.org. Check out their events and take the short trip.

Teresa Nino and Larry Kagan, presented a very interactive session on Identity Theft that brought out many personal examples and unfortunate circumstances from our attendees who were compelled to share experiences as victims of identity theft. It was really eye opening. I have to thank Teresa and Larry for partnering with Columbia Management and representative Jason Dills, who provided \$ 500 in sponsorship as well as Merrill Lynch covering the remainder of our expense for this meeting through their Diversity Program. I can't thank them enough.

The attendees truly made this a wonderful meeting. New attendees, mentors, mentees, students and our old faithful! Thank you very much for making this a terrific meeting!

Our next meeting should prove just as sensational, as it represents the true essence of networking. Our sponsors are two competitive, successful women who are principals in each of their companies and serve the same industry. I met each of them at an eWomen Network event on different occasions and both expressed interest in providing a session on a healthcare topic for our members. When I mentioned the interest of the other, they both agreed to work together to present this subject as a team. Since when does the competition work together? Not only that, but they will share in sponsoring this meeting as well. These sponsorships mean so much to us as they enable the Chapter to continue to sustain our Annual Scholarship.

Speaking of the scholarship, Paulina Faliszek our winner in 2008 made the presentation of our \$2,000 scholarship prize for 2009 to Mariya Kunets at Paulsdale. Here is another shining example of "promoting the future of our profession." I am very proud of the caliber of students we have with an interest in being active in The American Society of Women Accountants. This truly demonstrates the mission of our organization.

Please join us for our next value packed meeting and make sure you are getting the most out of your membership!

Very truly yours,

**Lori Lucente-McKeage
Philadelphia Chapter President**

May 2009 MEETING

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BY LAWS

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MENTOR PROGRAM

Theresa Copeland
170 Fariston Drive
Philadelphia, PA 19120

Event

Containing Client Benefit Costs: Present & Future

Location:

**Ponzio's Diner
7 West Route 70
Cherry Hill, NJ 08002
856-428-4804**

Date/Time:

Wednesday, May 13, 2009 at 6pm

Meeting Fee:

**Regular Members: \$ 20
Guests: \$ 25
Student: \$ 15**

RSVP:

**To Pam Wenner at 610-254-8961 ext 23 or
Email pwenner@bkicpa.com by Thursday, May 7, 2009**

In this presentation we will explain what's happened over the last few decades with healthcare costs and what has driven up the price of medical benefits. We'll share current employer/employee benefit trends and what employers can do to stop the hemorrhaging through introducing voluntary benefits, wellness, and disease management programs in their workplace. We will also focus on the growing need for consumerism among employees and how we can help our clients introduce consumer driven healthcare options to change current and future behaviors. We will discuss how consumerism will both drive costs down and promote effective competition for employer healthcare dollars.

About our Speakers:

LEANNE M.CINDEA

Leanne Cindea has spent the last 19 years consulting in the healthcare and insurance industry. She started her health and welfare insurance career at US Healthcare, one of the premier managed care carriers in the country. She served as a sales representative, account representative, and Medicare sales manager for the organization. In 1998, she pursued a sales consulting opportunity with Reimbursement Services (RSI) helping small and mid-sized businesses navigate the challenges of maintaining competitive benefits packages in the workplace. She joined Evesham Capital Management in 2005 to build her own health and welfare practice and continues to pursue her passion of becoming the trusted advisor to her clients.

Leanne is an active member of the Tri-State Human Resource Management Association volunteering for a variety of different committees for the organization. She has been chosen as a featured speaker at the Tri-State HRMA annual conference in May, 2009

...continued on the next page

About our Speakers:

LEANNE M. CINDEA (continued)

As a seasoned benefits practitioner, Leanne is looking forward to sharing her expertise with several audiences this year as a guest speaker. Her engagements include presentations to the Philadelphia chapter of the American Society of Woman Accountants and the State of Pennsylvania Annual Conference for the Society of Human Resources Management (SHRM)

As an active supporter of the Non-Profit community, Leanne has served as a member of the Board of Directors for Big Brothers Big Sisters and most recently served as Chairperson for the Board of Trustees for Big Brothers Big Sisters of Camden & Gloucester counties.

Leanne resides with her husband in Mount Laurel, New Jersey.

TERRIANN PROCIDA

Terriann Procida is a founding partner in the employee benefits firm of Innovative Benefit Planning, L.L.C., which was established in 1989. Terriann has over 20 years experience in the insurance industry providing employee benefit services to business owners and executives nationally. Her experience working with diverse businesses of all sizes has helped Terriann to identify key challenges that may be resolved via a more powerful and flexible benefit designs. As a business owner herself, Terriann brings a valued perspective when assisting her clients in their benefit decisions. She has received many accolades from her clients and colleagues over the years. Her most recent recognition was from South Jersey Magazine where she received the Women in Business recognition.

In her spare time, Terriann immerses herself in many professional and volunteer activities including the National Health Underwriters Association, the Tri-State Human Resource Management Association, Women's Presidents Organization, eWomen Network and International Foundation of Employee Benefits. Terriann is a member of the Board of Trustees of Archway Programs and recently served on the committee for Samaritan Hospice's annual Gala event. Terriann resides in Moorestown, NJ with her husband Mark and their three children.

We would like to send a very much appreciated THANK YOU to both LEANNE M. CINDEA along with Evesham Capital Management and Terriann Procida along with Benefit Planning, L.L.C for sponsoring our May meeting. We do appreciate all the assistance you have given us.



The Spotlight this month:

We are extremely happy to welcome back to our membership **Alice Gorman**, Philadelphia Chapter President 1990-1992.

Alice is currently the Office Manager for Road Safety Systems, LLC, a company that installs guiderail, signs, fencing and is a special materials supplier & installer. They are concentrated in public work - municipalities, counties & NJDOT/Federally funded projects. The company was organized in August 2007 and Alice came on board in June 2008. The company is anticipating a very busy next few years with the release of funds for federally funded infrastructure projects through the Economic Stimulus Program.

For many years Alice worked for Atlantic Electric until the company merged with Delmarva Power & Light and moved the corporate offices to Wilmington. She then worked per diem and became the President of the Lay Advisory Board for St. Joseph Regional School in Hammonton during their school expansion when the Diocese of Camden bought the old Hammonton Middle School and separated Pre-K through 8 from 9-12.

Alice joined ASWA as a student member in 1984, while she was planning her wedding. "I have grown up in ASWA. I have gotten married, divorced and raised my children in ASWA. It has been a constant in my changing life for the past almost 25 years. Even when I was not an active member, I was in touch with many of the women I met through ASWA. I am currently enjoying my new digs on the banks of the Mullica River in Lower Bank, NJ. Helen (20) is a sophomore at The College of New Jersey. Jessica (19) (who I nursed during my first planning meeting as President!) is a freshman at the University of Delaware. Anthony (15) is a freshman at St. Augustine Prep in Richland, NJ. He is playing on two baseball teams so I watch ALOT of baseball! I am an avid skier, reader, knitter & Phillies season ticket holder."

"I am thrilled to be working full-time in my profession again and am putting my CPA license back on active status. I am very excited to get involved with the women new to our profession and organization, especially the friends of my daughters such as Mary Lorenz and one of my children's old babysitters and the daughter of a dear friend, Stephanie D'Agostino! I am an example of how ASWA and the contacts and friends I have made over the years have sustained me throughout my career and my life."

We are so happy to have Alice back as an active member to begin the next of her life with us, as we enter the next decade of our Chapter's life.

Message from our Scholarship Winner Mariya Kunets

“It was my pleasure to meet all of you at the April Meeting. I was very excited to receive the scholarship because it will help me pay for my books and supplies next semester. Also, I plan to use some of the money on a CPA preparation course. I took Lori’s advice and decided to start preparing for the CPA while still in school.

Thank you for sharing your experience with me and for your advice regarding the CPA exam. Both, my husband and I enjoyed the meeting. We got a lot of useful information from it. I think the presentation on Identity Theft was very informative and helpful.

I got married last month, March 21st. My husband's name is Dennis Dmitriev, he works in video production as a creative director. He created commercials for such companies as Apple Vacations, Homeland Security and many others. Currently we live in Philadelphia, a couple minutes away from Drexel. After I graduate, we plan on moving close to my job. I plan to look for a job either in Accounting or in the Finance field. I try not to limit myself to only one option, I want to be open to various opportunities.”

We wish Mariya continued success in her education and the start of a fabulous career.



ASWA MEETING SCHEDULE

<u>DATE</u>	<u>LOCATION</u>	<u>PROGRAM</u>	<u>SPEAKERS</u>	<u>SPONSORS</u>
Thursday May 7, 2009 Board Meeting	Isdner & Company, LLC Three Bala Plaza, Ste 501 Bala Cynwyd, PA 19004	Executive Team Only	Conference Call optional	
Wednesday May 13, 2009	Ponzio's Diner West Route 70 Cherry Hill, NJ 08003	Containing Healthcare Costs	Terriann Procida and Leanne Cindea	Innovative Benefits Planning, LLC Evesham Capital Management
Wednesday June 17, 2009	Bryn Mawr College Bryn Mawr, PA	Past Presidents Recognition Installation of Officer	A Purely Networking Event	Becker CPA Review
Saturday July 25, 2009	Home of Mary-Claire Corcoran Glenside, PA	Planning Meeting Working Session to Establish Next Years Program		We Encouraged All Members to Attend



The Philadelphia Chapter of ASWA entered an agreement for alliance with the Greater Philadelphia Chapter of the National Association of Women Business Owners (NAWBO) on January 19, 2009. NAWBO's Alliance Mission is to:

- Strengthen the network of women's business owners in the Greater Philadelphia area.
- Create innovative and effective ways to work together with the other groups & associations.
- Build strategic alliances, coalitions and affiliations.

The Greater Philadelphia Chapter of NAWBO agrees to do the following for these alliances, and the Philadelphia Chapter of the ASWA reciprocates:

Logo placement on Chapter Website ♦ Access to member database one time per year basis ♦ Program Attendance at member rates – unlimited for members of these alliances. For more information regarding NAWBO and their meeting schedule go www.nawbophila.org.

The Mentor Program Achievement Contest

We want to remind all of our teams that the grids for April are due on May 2nd. At this time all catch up grids should be included. The contest then will run for one final month ending May 30th. All final Grids must be reported to Theresa and her team by June 2nd for final evaluation. Grids received after June 7th will not qualify for the contest. It's time to get serious and be competitive in order to get the most out of this contest!

Team Green: - Marian Derr and Kari Davidson hold their lead still being in first place this month with 908 points to date. This is remarkable given the fact that Kari has not reported since January. Marian keeps her networking going and daily contact to Kari with relevant accounting and finance related news articles.

Team Purple: - Renee Cooper and Lori Culbertson remain in second place with 487 points.

Team Red: - Pam Wenner and Laura Taylor remain in third with 448 points again that is without Pam reporting for March due to her tax season commitments.

Tax Season has really taken a toll on our teams, so let's get back on it! As I indicated in my presidents address, the April Meeting was a great kick start. Let's see what you can come up with next to meet your goal.

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The Employment Committee Reports:

In this hard hit economy, many people we know have experienced the unfortunate state of unemployment. ASWA will continue to assist in passing on opportunities that are presented to us.

Here are a couple of areas to explore:

Our Friend at Villanova, Brenda Grove has offered the following information. Check out www.mycareertransitions.com. You're invited to attend a free meeting of professionals in career transition. This group meets monthly on a Saturday morning. The next meeting will be at Villanova University on May 9, 2009. For meeting details, go to www.mycareertransitions.com. Please pre-register. For additional information on this group or to be included on a distribution list announcing a variety of events for those in transition, please contact brenda.grove@villanova.edu or 610-519-5234."

Also for those who need some extra attention on their resume or career counseling. Brenda has this to offer. She has started doing some job search assistance, in return she is accepting a donation to her daughter's fund raising effort. She needs to raise \$4,000 to support [diabetes/health education](http://diabetes/health_education) in Ecuador before going there for the month of July. According to Brenda "That's a lot of cookies for me to bake or not so many resumes to review! I'm a former outplacement consultant. This is all after hours so it will not interfere with my regular work. It's a sliding scale, starting at \$10/ hour for a student. They can contact me by e-mail or at 610-793-2734."

IRS Stakeholder Liaison presents:

National Phone Forum
Proper Worker Classification

Date: May 20, 2009

Cost: FREE

Location: The convenience of your home or office

This IRS phone forum is for

- Tax Professionals
- Small Business Employers
- Small Business Organizations
- Industry Partners

Learn about:

- Worker classification categories, employee vs. independent contractor
- Categories of evidence for proper classification
- Worker classification related forms
- Treatment of corporate officers
- Section 530 relief requirements

Earn Continuing Professional Education credit

- Enrolled agents receive one CPE credit for a minimum of 50-minute participation from the start of the forum
- Other tax professionals may receive credit if the phone forum meets your organization's or state's CPE requirements.
To receive credit, register individually and use your PIN.
- Call in using your individual phone line so your attendance can be verified.
- Look for your Certificate of Completion by e-mail approximately one week after the forum. If you have met all requirements, you will receive your certificate automatically; there's no need to follow up.
- If you and others in your office do not require a CPE certificate, please have only one person register on the group's behalf and use your speaker phone to dial in. This will maximize the number of lines available for other participants and help reduce costs.

National Phone Forum, May 20, 2009

Sign up now (and no later than May 15, 2009)

- Select the time that works best for you
 - ALL TIMES ARE EASTERN DAYLIGHT

CONFERENCE ACCESS CODE	EASTERN	CENTRAL	MOUNTAIN	PACIFIC
140711	10 a.m.	9 a.m.	8 a.m.	7 a.m.
311314	1 p.m.	Noon	11 a.m.	10 a.m.
719050	4 p.m.	3 p.m.	2 p.m.	1 p.m.

- Register at www.atevent.com by May 15. Reservations are limited, so register at the earliest date possible.
- You will receive a Personal Identification Number that you must use to join the conference.
- If you have never registered with AT&T for a prior phone forum, you will first need to click on *create a profile*.
- If you require special accommodations (for example, Braille, large print or interpreter services) please contact Brian Finn at nationalphoneforum@irs.gov.
- We will e-mail presentation materials on May 19. **If you do not receive this e-mail by 2pm on May 19**, e-mail us at nationalphoneforum@irs.gov to request the materials.

Dial in on May 20, 2009

Toll free: 1-866-216-6835

Toll: 1-913-227-1220

- Dial in at least 5 to 10 minutes before the scheduled time.
- Enter your access code, then the pound (#) sign.
- Enter your PIN, then the pound (#) sign.
- Your line will be placed on hold until the conference begins.

A question and answer period will follow the presentation. However, due to the public nature of the call, we will not be able to address specific client issues.

Questions? E-mail nationalphoneforum@irs.gov