



www.afwa-phila.org

PRESIDENT

Jan S. Spiegel
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PRESIDENT'S MESSAGE

Hello Members and Friends of the Philadelphia Chapter,

We have had a very busy October with the extension filing season, our chapter meeting and our AFWA National Conference, Women Who Count, in D.C. If you were unable to make our October meeting, you missed an exceptional presentation given by Melinda Emerson, the Small Biz Lady. Melinda spoke on the 12 P's in "How to Fix Your Business", a new book of hers, to be released in March 2018. Some are applicable to organizations as well as to businesses. We need to **Prepare**, have a **Purpose**, have **People** so that we can **Profit** – and we're not necessarily talking money. Those are just four of Melinda's 12 P's. You'll have to buy the book for the rest.

TREASURER

Mary-Claire Corcoran, CPA
27 Chelfield Road
Glenside, PA 19038
215.990.0219
corc2chel@aol.com

Seven members of our chapter attended the conference. There were so many great sessions to attend and many at the same time! On Saturday, there were sessions that dealt with programming, increasing attendance and attracting new members. I plan on using many of these methods for our chapter. I implore you to go up to new and unfamiliar faces at our meetings and talk to the new attendees. We want to make them feel comfortable so that they will come back and join our membership. That is the vital ingredient of a successful chapter and making it grow.

SECRETARY

Theresa Copeland, EA, MSM
Manage Your Business, LLC
PO Box 115
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215-680-1902
Theresa@manageyourbusinessow.com

Our **November 15th** meeting will be on long term care insurance and **Jonathan Pollack, CLTC**, will be speaking to us on the subject. There is so much to know on this and the information keeps changing. It's important to keep up on this. Our December social will be held on Sunday, **December 10th**. We will first be getting together for lunch at **Pizzeria Pesto** in south Philly. Then onto our 2:00 matinee at the **Walnut Street Theater** to see **Annie**. Tickets are limited, so please put in your reservations now! And mark your calendars for January, as our **Tax Update** will be on Wednesday, **January 10th**. It will be interesting to see what we end up with come January on this particular matter.

DIRECTORS

Mary Duff, CPA
Judy Maira
Pam Wenner

Lastly, it's our **scholarship** season. If you are or know a student, please have them visit our website at <http://www.afwa-phila.org/Scholarship/index.html>. There is information and an application for the 2017-18 scholarships. All applications are due February 15th. Good luck!!

IMMEDIATE PAST

PRESIDENT
Stephanie Sommers, CPA
ssommers@stclaircpa.com

So that is what has been and will be happening in the next few months. Check our website for more information

See you at our November meeting!

Jan S. Spiegel,
President, AFWA Philadelphia Chapter

NATIONAL HEADQUARTERS

1-800-326-2163

www.afwa.org
afwa@afwa.org

November Meeting Notice

EMPLOYMENT / MEMBERSHIP

Lori Lucente-McKeage
New York Life Insurance, Agent.
555 City Ave., Suite 800
Bala Cynwyd, PA 19004
W-610-617-4488
C-609-504-8956

lmckeage@ft.newyorklife.com

NEWSLETTER / WEBSITE

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Wayne, PA 19087
484-620-0549

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SCHOLARSHIP

Mary Feeney-Bonawitz, PhD,
CPA

3102 Village Road
Orwigsburg, PA 17961
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MFBonawitz@verizon.net

Judy Maira

Germantown Cricket Club
411 W. Manheim St
Philadelphia, PA 19144
215-438-9900 ext 215

controller@germantowncricket.org

STUDENT LIAISON

Stephanie Sommers, CPA

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Conshohocken, PA 19428

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Theresa Copeland, EA, MSM

Theresa@manageyourbusinessnow.com

PROGRAMS

Patricia Kane

patricia.kane@towerswatson.com

BY LAWS/ LEGISLATION

Mary Duff

mduff@duffaccountingsolutions.com

Event: Long-Term Care Insurance Update

Location: St. Clair CPA Solutions
101 W. Elm Street
Suite 500
Conshohocken, PA 19428

Date/Time: Wednesday, Nov 15th / 6:00pm

Cost:

Members	\$ 20
Non-members	\$ 25
Students	\$ 10

RSVP: Please contact Patricia Kane
by end of day, Monday, Nov 13th via
email: [RSVP for Nov meeting](#)

About our Speaker:



Jonathan Pollack, CLTC

Mr. Pollack graduated from Temple University 1991 and has worked exclusively in the individual and group long-term care insurance industry for over 25 years. He has lectured extensively and has spoken at Marriott Corp., Presbyterian homes, AARP chapters and many other retirement communities. In addition, he has published numerous articles in a variety of senior publications such as Seniors and Golden Times.

As a long-term care insurance specialist, Jon has trained MassMutual agents since 2000 when MassMutual developed a Long-Term Care product. He also works as a consultant to a number of local accountants, financial planners and attorneys.



Get your holiday shopping started!

*There will be vendors from **Norwex** and **Thirty-one** at our November meeting. Don't miss out on the raffle prizes.*



Do You Mentor?

Bryce Sanders, President of Perceptive Business Solutions Inc., makes a strong case for becoming a mentor. Sanders contributed an article for AccountingWeb that spells out many of the reasons why you should want to be. And he included a link to the Philadelphia Chapter of AFWA's mentor program.

<https://www.accountingweb.com/practice/team/do-you-mentor-if-not-heres-why-you-should?platform=hootsuite>



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
27 Chelfield Road
Glenside, PA 19038

Please make checks payable to **AFWA 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.

Members Corner

Meet our newest member, **Lana Geleff**. Lana is originally from Russia, but has been here in the Philadelphia area since 2000. Her education in Russia gave her a Masters in Survey Engineering. After landing in Philadelphia, she has obtained her Associates degree in Accounting at CCP. Lana is currently working at Alek Air Management, Inc., but is looking for a position where she can use her accounting knowledge. So, if you know someone who needs an accountant, she's right here.

Lana lives in the northeast section of Philadelphia, and if you haven't said hello to her yet, don't miss the opportunity in November!



Our Affiliations

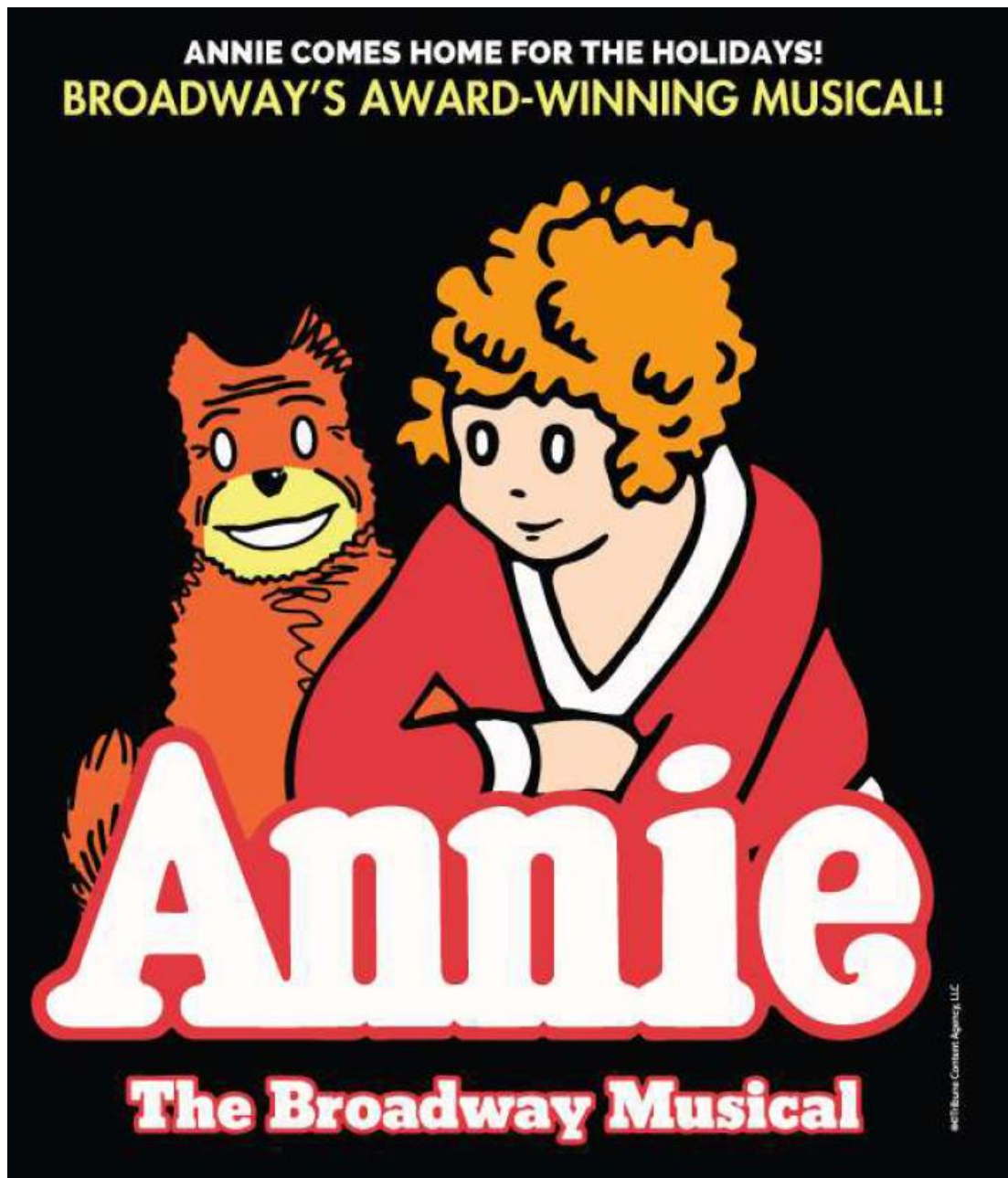
Did you know that we have affiliations with WIFS and ALPFA as well as the other companies you see here? What does this mean for you? By being an affiliate of these professional groups they allow us, the members of AFWA, to attend their meetings at their member cost. This allows us to expand our networks which can help us to grow both professionally and personally. The company affiliates extend discounts for some of their services. To find out more about them and see their meeting schedules, please check out their websites. Don't miss the discounts for the CPA review courses and other benefits offered by our affiliates (just click on their icons to go to their websites):



December Social

It's almost time for our annual December social. Don't miss out on this wonderful show at the Walnut Street Theater and join us for a preshow lunch. Members, family and guests are welcome. Tickets (\$55) are limited so please RSVP soon to Trish, [RSVP for Annie](#).

Sunday, December 10th @ 2:00
Preshow lunch at Pizzeria Pesto at 11:30





Upcoming Events

December

Annie the Broadway Musical

Location: Walnut Street Theater

Date: Sunday, December 10th, 2pm

Preshow Lunch: 11:30 at Pizzeria Pesto

Tickets are limited so be sure to send your RSVP

January

Tax Update

Speakers: Glen Dymond, CPA & John Campbell, III, CPA

Location: St Clair CPA, Conshohocken

Date: Wednesday, January 10th, 6:00pm

February

Joint Meeting w/NCCPAP

Hosted by: National Conference of CPA Practitioners

Location: Peppers Restaurant, King of Prussia

Date: Tuesday, February, 13th, 6:00 pm

March

Tax Season Hiatus

We wish all the best to our members working long hours during tax season. We hope to see you after April 15th.

April

Human Resources

Speaker: Lauren Flounders

Location: Ponzio's in Cherry Hill, NJ

Date: Wednesday, April 18th, 6:00pm



Deadline for inclusion in the next newsletter is November 27th

Please forward all submissions to **Pam Wenner** at pwenner@bki.com.

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



**Social Security and Medicare:
Rules, Opportunities and Pitfalls**

A special retirement planning workshop with expert guest presenter,

Mary Beth Franklin

Hosted by New York Life Insurance Company

Tuesday, November 14th, 2017
6:45 pm - 7:45 pm
Sutherland Auditorium -Penn State Abington
1600 Woodland Road, Abington, PA 19001

RSVP to:
Lori Lucente-McKeage, Agent
Cell: 609/504-8956
Email: Lmckeage@ft.newyorklife.com



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! Send them go to www.afwa-philadelphia.org and go to **MEMBERSHIP**.

Or click to **RENEW-JOIN**.

