



American Society of Women Accountants

October 2007

Philadelphia Chapter

Volume 57, Number 3

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**PRESIDENT'S MESSAGE**

Hi Everyone,

I know that many of you are stuck in between the two extension deadlines for corporate and individual tax returns. Many are getting acclimated to meeting school bus schedules, running to after school sports and recreational events, or are getting back from vacation, attending numerous meetings and scheduled events and working up to quarter end closing deadlines. So if you weren't able to attend, the September meeting, you missed a very interesting retirement plan alternative for small businesses. Our speaker was John J. Koresko, V, Esq., and CPA, who brought humor to the subject. I would also like to thank Steve Morris who put the presentation in place for us through Penn Benefit Services and Koresko Financial, LP and who also sponsored the dinner for the evening.

Although, we don't have a regular meeting scheduled for October, there is so much for all of us to do. There will be another Student Night planning meeting on October 18<sup>th</sup>, 7pm, at the offices of Dechert, LLP. If you are able to participate, we could use your input. We will be discussing development of our mentoring project, which will be introduced as a pilot program at Student Night.

If you are unable to get to the meeting, please present our Sponsor Request Form to those in your company who can approve providing support for such an important Event. This is the most important Event of the year that keeps us true to our mission *...to enable women in all accounting and related fields to achieve their full personal, professional and economic potential and to contribute to the future development of their profession.* If you can go a step further and send it along with the attached letter to some of your other business contacts it would truly help expand our reach.

Don't forget, the CPE reporting deadline follows the end of this year. There is no better way to obtain up to 24 credits than to couple it with a vacation to Disney World in Orlando, Florida. Please join Mary-Claire, Mary Duff and me for a fabulously enchanting and adventure-filled networking event.

Very truly yours,

Lori Lucente-McKeage  
Philadelphia Chapter President

**MEMBERSHIP**

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**STUDENT NIGHT**

Jean Rigney, CPA  
 Dechert LLP  
 Cira Center  
 2929 Arch Street  
 Philadelphia, PA 19104-2808  
 W-1.215.994.2256  
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**MENTOR PROGRAM**

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[territess@yahoo.com](mailto:territess@yahoo.com)

**EMPLOYMENT**

Lori Lucente McKeage

## October Planning Meeting Notice

**Topic:** Continued Planning of Student Night Event

**Date:** Thursday, October 18, 2007

**Time:** 6:00 p.m.

**Cost:** Light dinner covered by the chapter treasury

**Location:** Dechert, LLP  
 Cira Centre  
 2929 Arch Street  
 Philadelphia, PA 19104

**RSVP to:** Jean Rigney by end of day Tuesday October 16, 2007 at [jean.rigney@dechert.com](mailto:jean.rigney@dechert.com) or call her at 215.994.2256. **Jean needs to order the food and to give your names to security so you can enter the building. You will need picture ID to enter.**

### Directions to Cira Center

The Cira Center is Philadelphia's newest high rise.

It is attached to 30<sup>th</sup> Street Station on the Arch Street side, just off the Schuylkill expressway. If you come by regional rail, you don't even have to go outside.

There is parking in the Amtrak garage behind the Cira Centre or if you are lucky, there are metered spaces around 30<sup>th</sup> Street Station where you can park for up to two hours.

**ASWA PHILADELPHIA CHAPTER  
MEETING SCHEDULE**

<b>DATE</b>	<b>LOCATION</b>	<b>TOPIC</b>
<b>October 18, 2007</b>	<b>Dechert LLP</b>	<b>Continued Planning of Student Night</b>
<b>November 13, 2007</b>	<b>Doubletree Guest Suites 640 West Germantown Pike Plymouth Meeting PA 14946</b>	<b>Student Night</b>
<b>December 7 , 2007</b>	<b>City Avenue and Monument Road Bala Cynwyd, PA</b>	<b>The 10! Show Lunch at Olive Garden Restaurant</b>
<b>January 8, 2008</b>	<b>Liberty Personnel Service, Inc. 410 Fehely Drive King of Prussia</b>	<b>ESOP Plans SES Advisors</b>
<b>February 4, 2008</b>	<b>Towers Perrin Centre Square East 1500 Market Street Philadelphia, PA 19102-4790</b>	<b>Is It Time to Make a Change ?</b>
<b>March 2008</b>		<b>No meeting due to tax deadlines</b>
<b>April 22, 2008</b>	<b>Ponzio's Restaurant 7 West Route 70 Ellisburg Circle Route 70 and Kings Highway Cherry Hill, NJ 856.428.4808</b>	<b>Sharpen Your Delegating Skills</b>
<b>May 15, 2008</b>	<b>Dilworth Paxton 3200 Mellon Bank Center 1735 Market Street Philadelphia PA</b>	<b>Legal advice in Planning for Eldercare Timothy J. Rice, Esq.</b>
<b>June 17, 2008</b>	<b>Bryn Mawr College</b>	<b>Past Presidents Recognition Installation of Officers</b>

**This is a tentative schedule.  
Dates and topics may be announced in the newsletter or on the website until both  
the location and the speaker have been confirmed.**



## Student Night Support

The newsletter includes the Sponsor Letter and Sponsor Form for Student Night referred to in the President's message. Please take a moment and mail the form to someone who might be interested in supporting Student Night. Please fill in the name of that person who you will be addressing and sign the bottom as a member of ASWA. Your support is greatly appreciated!!!

## Yearbook Committee

I would appreciate if someone would volunteer to chair our yearbook committee this year. We are looking for a member who is computer savvy, a techy-type who can work with the information that we have in our membership database using Access. The person would be responsible for coordinating the printing and mailing of our annual membership yearbook to be issued in early January. Please contact Lori McKeage if you are interested in the Yearbook or other open position in the organization.

## Member Spotlight

Meet Our Newsletter Chair  
Cynthia J Makarczyk

Cindy has been a member of ASWA since 1980, when she was attending Temple University, taking accounting courses to qualify to sit for the CPA exam. Cindy has a BS from Pennsylvania State University in Geological Sciences option Geophysics. She sat for the CPA exam and passed all four parts the first time. She received her CPA license on October 1, 1985 while working for Edelman and Eros, a public accounting firm. The firm later merged with J H Cohn of New Jersey. Cohn is now in the top 20 firms in the United States and Cindy works in their Small Business Department. Cindy has no children but enjoys life with her brother Michael, 3 German Shepherd dogs and her horse, Duke. She is planning to retire to her Uncle Ted's property (10 acres) in Milmay, New Jersey and to take her extended family with her. Cindy has served many committees and offices for the Philadelphia chapter. Most recently, she has been our bulletin chair over a number of years. She spends a number of hours on this each month and we greatly appreciate her effort to be the solid source of our communication with each newsletter.



# The Holiday Greeting Campaign...

.... was established a few years ago. The Chapter would like to bring back the tradition in 2007. Here's how it works:

In lieu of sending each ASWA member a holiday greeting card, fill out one card, slap one stamp onto the envelope and address it to

ASWA Family  
c/o Lori McKeage  
1012 Hillsboro Court  
Sewell, NJ 08080

along with a donation to the ASWA Scholarship Fund. Make your donation in the amount of what you saved on postage and cards or what you can afford to send in the spirit of the holiday.

We will post your greetings in the December Newsletter. All the greeting cards will be attached to a poster board. The board will be displayed at the December Event luncheon and the January Regular Meeting for all to appreciate. Please extend the holiday cheer to the future of our profession.

I am very please to announce that our Board of Directors of the Philadelphia Chapter of the American Society of Women Accountants resolved to make this year's chapter scholarship an award of \$ 2000 to one worthy student applicant. My goal as president this year is for the chapter to raise at least that amount in the 2007 – 2008 term. This will enable us to replenish the funds in preparation for the following year's award. Please help by participating in the first leg of our fund raising effort to meet this goal!

Cards must be received by November 25<sup>th</sup> in order for the Greetings to be included in the December Newsletter



## MEET OUR MENTOR PROGRAM CHAIR

Theresa Copeland

Theresa Copeland is an accounting management professional with over 25 years of accounting experience. She has 10 years of private industry accounting experience working in areas of estate, trust and other tax preparing and analysis, research grant and contract management, and financial reporting and analysis. She had been employed by Saul, Ewing, Remick & Saul, PNC (formerly Continental Bank), Moss Rehabilitation Hospital, Atlantic Financial Bank and InterOcean Management Corporation.

Additionally, she has over 15 years of experience working in the field of Non Profit Management. Her duties focus primarily on budgeting and forecasting, grant and contract management, audit oversight, financial reporting, analysis and planning, risk management, and strategic decision-making. She has been employed with Child Care Information Services-North as Fiscal Manager and Philadelphia Safe & Sound as the Director of Finance. Currently, she is employed at Norris Square Civic Association as the Controller.

Theresa holds a Master degree in Non Profit Management from Eastern University (PA) and a Bachelor degree in Business Administration concentrated in Accounting from Temple University. She has been a member of the American Society of Women Accountants since 2000. She is also a member of the National Association of Black Accountants, serves as Secretary of the Melrose Park Gardens Civic Association and Majority Inspector (Local Ward Division) for the Primary and General Elections. Theresa is Chief Financial Officer of I.D.E.A.L. Magazine Company, which is published and distributed quarterly in seven states that serves individuals living with disabilities and not-for-profits assisting the disabled community.

We are so happy to have Theresa chair our newest project, our Mentor Program.



# The 10! Show

Our December Social Event is our presence at the live taping of **The 10! Show** featuring Bill Henley and Lori Wilson.

20 free tickets have been reserved for ASWA members on Friday, December 7, 2007.

The location is at the corner of City Line and Monument Roads in Bala Cynwyd, PA.

The doors open at 10:00am and close at 10:25am – The show is live from 11:00 ‘til noon.

A list of all ASWA members interested in attending must be presented to the Audience Coordinator by October 31<sup>st</sup>.

If you are interest in attending, put in your request now to Lori McKeage via email at [seagem.llm@comcast.net](mailto:seagem.llm@comcast.net). Use that last personal day you’ve been saving for The 10! Show and holiday shopping. Following the show, we will meet for lunch at The Olive Garden Restaurant. The restaurant is only a block away! Then you can begin the shopping!

Remember there are only 20 tickets reserved, so it will be on a first email, first serve basis. If there is an immediate interest for more than 20 tickets, we will put in a request to see if we can obtain more. The sooner we have your responses the better the chances that everyone can go!

If you are not familiar with the show, check out NBC.com and go to **“The 10! Show”**

**Attention  
Accounting  
Majors!**

**\$3500**

Philadelphia CPA  
Review  
has donated a full  
scholarship!



**Student Night**

**Attention  
Accounting  
Majors!**

**\$2000**

**Cash  
Scholarship**

The Philadelphia Chapter of the American Society of Women Accountants (ASWA) presents:

When : Tuesday, November 13, 2007

Where: Doubletree Guest Suites  
640 West Germantown Pike  
Plymouth Meeting Pa 19462  
1.610.834.8300

**Registration will begin at 5:30 pm**

Meeting will start at 6:00 pm

Light refreshments will be served.

The price for students is \$5.00 - in order to provide refreshments we request an RSVP by November 2, 2007.

We will be having a panel presentation made up of representatives from different sectors of the accounting profession: public, government, industry, and non-profit, along with a representative from a CPA Review Course. Philadelphia CPA Review has donated a full scholarship (a \$3,500 value), which will be given away that evening. Philadelphia CPA Review has locations in Center City, Valley Forge, Northeast Philadelphia and Maple Shade and offers the options of live, online or CD ROM instruction.

Additionally, we are pleased to announce that we will be awarding one \$2,000.00 cash scholarship to a worthy candidate early next year for the 2008 fall semester. Entry applications will also be distributed and the requirement details will be discussed on Student Night. The person who is awarded the Chapter Scholarship will also be eligible for the ASWA National Scholarship.

For information contact [jean.rigney@dechert.com](mailto:jean.rigney@dechert.com).  
Also check out our website at [WWW.ASWA-PHILA.ORG](http://WWW.ASWA-PHILA.ORG).





## **Philadelphia Chapter**

October 1, 2007

Dear

I am addressing this letter to you as someone within the company who has been a support to our organization in the past or as a continued friend of our members.

As you know, each year we hold the "Student Night" event. We invite those studying in the field of accounting and their professors from the local colleges and universities to meet with members of the American Society of Women Accountants and to introduce them to some of our local accounting professionals and their companies. This year the event will be held on November 13, 2007 from 6 pm until 9 pm at the Doubletree Suites Hotel in Plymouth Meeting. Registration will begin at 5:30 pm.

We believe there are mutual benefits to all who participate. With regard to the local companies, we give you the opportunity to speak about your company, promote job opportunities and discuss your professional contributions and needs to a new group of future accounting professionals.

With regard to ASWA, we take this opportunity with regards to our organization's mission to enable women in all accounting and related fields to achieve their full potential and contribute to their future professional development. We assist in mentoring students in areas such as resume review, interviewing techniques, and CPA exam review tips. We provide a professional organization from which they can develop contacts and attend other professional meetings for future development and continuing education once they have graduated. We give an annual scholarship to aid in support of financing their education. This year there will be a scholarship available in the amount of \$ 2,000.00.

These are but a few of the benefits that will be derived by those who participate. We hope that you will again support ASWA and the students in making this a successful event by participating as a sponsor this year. I await the return of your sponsor form.

Regards,



**Philadelphia Chapter  
Annual Student Night  
Sponsor Form**

**Tuesday, November 13, 2007  
Doubletree Suites Hotel  
Plymouth Meeting, PA**

**Sponsor Fee:**            **Firms/organizations with 250 or more employees - \$250.00**  
                                 **Firms/organizations with less than 250 employees - \$100.00**

The Sponsor Fee entitles each firm/organization to host a table; two representatives to attend at no additional charge; opportunity to address students to discuss firm/organization and career options; and mention in ASWA literature distributed to local colleges.

Contact Name(s): \_\_\_\_\_ Telephone Number: \_\_\_\_\_

Name of Sponsor: \_\_\_\_\_

Street Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Billing address if different than above: \_\_\_\_\_

**Please provide the following information by November 2, 2007:**

Firm/Organization name and logo as it should appear on table card and promotional information to be included in literature distributed to local colleges. Promotional giveaways are welcomed as well.

**Please send the completed form and check made payable to ASWA as soon as possible to:**

Renee Cooper  
Stoltz Management  
725 Conshohocken State Road  
Bala Cynwyd, PA 19014  
Phone: (610) 610-667-5800  
Email: rcooper@stoltzusa.com

The American Society of Women Accountants (ASWA) is a professional non-profit organization whose mission is to enable women in all accounting and related fields to achieve their full potential and contribute to their future professional development.

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**PENNSYLVANIA IRS & PRACTITIONER LIAISON**  
*ANNUAL STATEWIDE LIAISON MEETING*

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TO: Selected members of PICPA, PSPA, PSEA, PA-NATP, PA Bar Association, and PA-ASWA

FR: Steering Committee for PA Liaison

RE: Annual Statewide Liaison Meeting, to be held at:  
Dechert LLP  
Cira Centre – 21<sup>st</sup> floor  
2929 Arch St  
Philadelphia, PA 19104

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**LOGISTICS & RESPONSIBILITIES**

Tuesday, October 23, 2007  
9:00 AM – 3:30 PM

The Steering Committee for PA Liaison invites you to attend our third annual, extended liaison meeting. According to our charter, each practitioner organization represented will be allocated a limited number of attendees to participate in the annual meetings. Your role will be as follows:

- *To participate in discussions about systemic issues that are raised during the meeting or on which you have information*
- *To gauge the direction and accomplishments of PA liaison*
- *To provide feedback to the steering committee during and after the meeting*
- *To share what you learn at the meeting with other members of your organization*

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**HOW TO APPLY**

By September 21, 2007, contact the PA liaison representative for your organization to indicate interest. Your representative will consider applicants based on demographics, professionalism and your ability to assume future responsibilities. Your Steering Committee liaison representatives are:

- PICPA, Ed Jenkins, CPA, [edwardj@wemanagetaxes.com](mailto:edwardj@wemanagetaxes.com) , 717-225-0970
- PSPA, Marvin R Huttman, CPA, [marvin@huttmancpa.com](mailto:marvin@huttmancpa.com) , 610-664-6600
- PSEA, Bill Matesevac, EA, [wpmatzea@alltel.net](mailto:wpmatzea@alltel.net) , 412-373-8195
- PA-NATP, Sean Brennan, CPA, [SBTax1@aol.com](mailto:SBTax1@aol.com), 215-248-5585
- PA Bar Assoc, Ronald M Wiener Esq, [rwiener@wolfblock.com](mailto:rwiener@wolfblock.com) , 215-977-2266
- PA-ASWA, Jean Rigney, CPA, [jean.rigney@dechert.com](mailto:jean.rigney@dechert.com), 215-994-2256

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The Amtrak parking garage is \$17/day – or you can take the train to the 30<sup>th</sup> Street Station and take the skywalk over to the building. The Dechert offices can be contacted at 215-994-4000 on the day of the event if assistance is needed.



## Mid-Atlantic Area Stakeholder Liaison Seminars

Obtain the latest **e-File, e-Pay, e-Service**, and **irs.gov** information when you attend one of the seminars below. Seats are limited, so please register in advance by contacting the representative for the session nearest you. If submitting an e-mail place in the subject line: Electronic IRS Seminar Registration, and include date of session, name, address, phone in the body.

### New Jersey

- |          |   |
|----------|---|
| 10-19-07 | Mercer Community College<br>1200 Old Trenton Road, Trenton NJ 08690 |
| 10-22-07 | Bergen Community College<br>400 Paramus Road, Paramus, NJ 07652     |
| 10-26-07 | Gloucester County College<br>1400 Tanyard Road, Sewell, NJ 08080    |

Times: To Be Announced

**Contact:** *Bryan Coffey* **Phone:** 732-777-7242 **E-mail:** *Bryan.D.Coffey@irs.gov*

### Eastern Pennsylvania

- |          |  |
|----------|--|
| 10-18-07 | Villanova University <b>(Fee to Attend)</b><br>Lancaster Ave. & Ithan Ave., Villanova, PA 19085<br>Time: 9:00 A.M. — 1:00 P.M. |
|----------|--|

**Contact:** *Richard Furlong* **Phone:** 215-861-1551

**New e-Filers are encouraged to dial in to a two part phone forum scheduled for Oct 2, 2007—Part I—Application, and Dec. 13, 2007—The Process (Rejects)**

**For additional information contact: Philip Yamalis at Philip.G.Yamalis@irs.gov**