

May 2014
Philadelphia Chapter
Volume 63 Number 6

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Accounting & Financial Women's Alliance

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Philadelphia Chapter

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PRESIDENT'S MESSAGE

Hello Everyone!

Happy Spring! Getting out and enjoying this beautiful weather has been wonderful. It was great to see so many new faces at our April meeting at Ponzio's. Lauren Flounders from Fusion Employer Services, LLC presented us with insightful and excellent information about Human Resources. Some of the topics included what questions can be asked on an application, how to conduct the interview, job descriptions and employee handbooks. I know I learned a few things. Our next meeting will be held **May 13th** at the Devry University in Fort Washington. **Tierney Coaching** will present "Tricks of the Trade: Coaching Professionals to Success". Tierney coaches provides what's been missing in professional services marketing – ACCOUNTABILITY. This program is not just for professionals who want to market their business but also for professionals who want to market themselves within their firm. The topics include establishing rapport, assessing conflict, and active listening. Keep checking our website for information for our closing June meeting when we install the new board and our July planning meeting. If you want to be heard, this is where you should be. We are always looking for new ideas. Join us in July as we plan the upcoming year and give us your thoughts.

I look forward to seeing you at our May meeting!

Truly yours,

Tracey Bond-Weincyzk

President, Philadelphia Chapter.

May Meeting Notice

Event: Tricks of the Trade: Coaching Accountants to Success

Speaker: Lisa Tierney, CLSC
Cheryl Oribabor, MBA, CHLC
TIERNEY Coaching & Consulting, Inc,

Location: Devry University
1140 Virginia Dr.
Ft. Washington, PA 19034
(215) 591-5700

Date/Time: Tuesday, May 13 at 6:00 pm

Cost:

Members:	\$ 20.00
Non-members	\$ 25.00
Students	\$ 15.00

RSVP: Please contact Tracey Bond-Weinczyk by end of day, Monday, May 12 by email
afwaphilly@gmail.com

Tricks of the Trade: Coaching Accountants to Success

Staying focused on marketing efforts when you have an accounting practice to run seems impossible at times! But without focus, you may be resolved to irregular and inconsistent efforts which are a waste of time, money and discouraging to all involved.

Address what's been long-missing from professional services marketing: Accountability. Learn successful tools & techniques that coaches use to keep CPAs focused and on track so they can achieve their goals.

Topics to be Explored during the Program:

- Establishing rapport
- Mirroring concerns/identifying issues
- Assessing conflict
- Identifying limiting beliefs and self-imposed obstacles
- Asking thought-provoking, open ended questions
- Active listening
- Shifting Perceptions through understanding brain hemispheric dominance and integration
- Moving from the problem toward the solution

By harnessing the methods of professional coaching, you can assist your firm with improving morale by empowering staff, assisting your professionals with achieving their goals and increasing the firm's bottom line.

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About our Speakers:



Lisa Tierney, CLSC is an award winning marketing consultant and a certified life strategies coach with nearly twenty years of experience in serving multi-partner professional services providers across the U.S. She has provided webinars, teleconferences, workshops and keynote presentations for such organizations as the Association for Accounting Marketing, the International Coach Federation, the PICPA, the Association for Accounting Administration, the Institute of Management Accountants, to name just a few. She is a member of the CPA Leadership Institute's Leadership Panel and an active member of the International Coach Federation. She has been published in numerous publications, including Accounting Today, Legal Intelligencer, and the Philadelphia Business Journal.

Cheryl Oribabor, MBA, CHLC is a highly-experience marketing consultant with over ten years of working with professional services providers. She is a talented and creative marketing professional, with a proven ability to implement new programs and projects utilizing a strategic plan approach. Cheryl's strength lies in her ability to utilize a strategic approach when discussing new programs and initiatives. Well-formed outcomes, partner buy-in and attention to details such as internal procedures and processes are a strong part of her consultative approach. Cheryl's calm, reassuring demeanor is a tremendous asset when dealing with staff at all levels. She is an often published author, having written for numerous accounting-focused publications such as the *CPA Practice Management Journal*, the Association for Accounting Marketing's *Growth Strategies* and has made presentations to the International Coach Federation.



Members Corner

Congratulations to **Mary-Claire Corcoran** who has just agreed to be the campaign treasurer for **Bob Gillies**, who is running for PA state representative in the PA 154th district, which includes Springfield, Cheltenham and Jenkintown. If any of our members have ever served in this capacity, Mary-Claire would appreciate any tips you could give her.

We would like to welcome new members to the Philadelphia Chapter: **Issani Bradshaw, Diann Furfaro, Adrienne Straccione and Cathy Arnold** to the Philadelphia Chapter. Please introduce yourself to them at the next meeting that you see them at. We will feature their bio's in future newsletters.

Meet our new member.



Sara has been in the financial services industry for over 11 years and hold a Bachelor's Degree in Finance from Central Michigan University. She is also a member of The Main Line Chamber of Commerce and the Pennsylvania MGMA.

Sara currently works at Wells Fargo in Bala Cynwyd as a Private Banker, where she works with clients to gain a comprehensive view of their unique financial situation and together, explore a wide range of options to help her clients achieve their short and long term financial goals. Prior to working at Wells Fargo, Sarah spent 5 years at Sun Trust Private Wealth and JPMorgan Chase in Okemos, Michigan before that.

She lives with her husband in the Philadelphia area.



They say bad things come in threes. . . .

We want to give our sincerest condolences to those members who have lost loved ones recently....

Theresa Copeland's husband Edward who had passed away in February

Ed worked in the banking industry before being drafted into the Army in 1969 during the Vietnam War era. He served as Platoon Sergeant for two years then returned to Philadelphia to further his banking career. He worked nearly 30 years as a US Postal Clerk.

Edward leaves to cherish his memory, his wife Theresa, twin daughters Zarifa dn Ayasha,

Sharon Greenberg on the death of her father, Nathan Form in March.

Tracey Bond- Weincyzk on the death of her father-in-law also in March.



We are putting our new board together for next year. If you are interested in serving or volunteering in any way, we would LOVE to have your assistance and ideas. Please contact Tracey Bond-Weincyzk at: afwaphilly@gmail.com

Some of our open positions are Scholarship Chair and Meetings Coordinator.

Bruce E. Risler, CERTIFIED FINANCIAL PLANNER™,
Mary-Claire Corcoran, CPA and Michael S. Connor, Esq., presents:

The Family Love Letter™

Tuesday, May 13th at 10:30am or Tuesday, May 20th at 6:00pm

Jeanes Library, 4051 Joshua Rd., Lafayette Hill, PA 19444

Guests are welcome!

Please RSVP (215) 990-0219 or mccorcoran CPA@gmail.com



Regardless of what phase of our lives we are in – parent, child, sibling or favorite aunt or uncle, at some time in our lives, we are faced with the challenges related to our or a loved one’s incapacity or death. The problems are many and the solutions are few.

Each of us will leave a legacy. Will it be a legacy of confusion or of information? Will we add to the trauma of our death or incapacity by adding to its inherent confusion, or leave a roadmap to those who follow? Will we leave a *Legacy for the Living* – of the stories, hopes and desires for our family?

The Family Love Letter is a gift – of time, love, clarity.... You want them to know how to find your professional advisors; where your investments, insurance, and other assets are held; what employee or retiree benefits you’re entitled to; where to find information on trusts, power(s) of attorney, citizenship, military records, burial information, or business ownership; your plans for a special-needs family member; where to locate passcodes to your computer/software, information regarding your pets, and which philanthropic organizations hold a place in your heart.

It is their legacy – what Mom believed about friendship, lessons Dad learned building his family business, and other life sustaining stories about their values and beliefs that parents most wanted to pass-on to their families and what their loved ones most wanted to receive and preserve. *If you love someone, give them the gift of a Family Love Letter.*

You and your guests are welcome to join us at the Family Love Letter presentation. It’s a beautiful gift – to yourself and your loved ones.

Job Corner

PWC is looking for candidates with 4-6 years experience for positions in their **Audit and Assurance Department**. If through AFWA you are a successful candidate, the Accounting and Financial Women's Alliance Philadelphia chapter will receive a finder's fee pledged to support our Scholarship Awards for 2015. If you or someone you know is interested in this position, please send your resume to Joe Corcoran at joseph.t.corcoran@us.pwc.com. Don't forget to let Joe know that you heard about the position through AFWA.

We would love to help one of our friends be offered this opportunity and to help us support our Annual Scholarship. Thanks for the lead Mary Claire!



June Chapter Meeting **Tuesday, June 10,**
Officer Installation / Scholarship Fundraiser
Location: TBD

July Planning Meeting **Saturday, July 26,**
Planning of 2014-15 programming
Location: Lori's Boat, Longport.
Bring your ideas, swimsuit and towel

Deadline for inclusion in the next newsletter is May 20th

Please forward all submissions to **Jan Spiegel** at: jsrspiegel@comcast.net.
Use **AFWA newsletter** in the subject for all submissions please.



Support for our Unemployed Sisters of the Philadelphia Chapter

We are happy to report that the board has decided to assist our loyal, dedicated members who have found themselves on the unemployed rolls. For those members that qualify, the Philadelphia Chapter of AFWA 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, the Mentor Program or a position on the Board. All applications can be sent to our Membership Chair, Lori McKeage via email (seagem.ilm@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. If you need assistance, please visit our membership tab of our website to obtain an application form.

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 or finance. We will also send acknowledgments to your honoree, just send the information.

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):



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 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 or financial professional who is not a member, please tell them about us! Have them go to www.afwa-phila.org. Click on **MEMBERSHIP**. Or click on this



blue seal to **RENEW-JOIN**.

