



American Society of Women Accountants

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PRESIDENT'S MESSAGE

This holiday season was particularly special for me. I haven't seen my college roommates for several years, and we had a nice reunion in Riverside on Christmas day. The following day, my husband and I drove to Los Angeles to visit our colleagues and friends whom we "grew up with" in the corporate world. We were all single then, and we worked as financial analysts or engineers at Hughes Aircraft Company in El Segundo. We talked of the many mergers, acquisitions, sell-offs, buy-outs, layoffs, and the general movement of people we have known for the 10-12 years we worked in that industry. It was particularly nice to see how everyone adapted and/or moved on, and how families and children grew - there are lots of teenagers from our group of friends. We laughed about silly things, shared tears when we spoke of loved ones that we lost, and we grew serious when we talked of war in Afghanistan. Mostly, we were thankful that we had a chance to visit and reconnect.

Now, on to ASWA business. Six months have passed, and it's time to review our goals for the year. Our scholarship goal is to raise \$5,000. We have raised close to \$4,000 since July, through the sale of a review course, the holiday auction, the generous donations from members and the community, and the birthday gift raffles. Our next fundraiser is the sale of See's Candy. This will begin at the end of January and Paige McClelland has offered to coordinate this event. You will be hearing from her in the near future...

We have two membership goals. One goal is to retain a minimum of 58 members at the end of the year, and the second goal is membership participation. We set a very high goal to have 80% of our members participate in at least 4 events. Translated, this means that we want at least 46 members to participate in at least 4 actions. This includes attendance at a dinner or board meeting, helping out on a committee, the selling of wrapping paper or See's candy, or helping at any special event. To date, 23 members have met the participation goal. I hope those of you who have not had a chance to come to a dinner meeting or special event, find the time to do so. We have a terrific program lined up for the second half of the year, and I hope to see you at several of these events.

HAPPY NEW YEAR! Pam

IN THIS ISSUE
Announcements.....2
Monthly Meeting Announcement.....3
Issues & Interests..... 4
Calendar..... 6



SANTA BARBARA CHAPTER ANNOUNCEMENTS

Scholarship Committee Kudos !!!

We would all like to sincerely thank the Scholarship Committee for their time and effort in finding such a well-deserved group of scholarship winners (noted below). The committee was chaired by **Tricia Krout** who was assisted by **Sue Smith** at Santa Barbara Botanical Garden and **Christy S. Janka** at Damitz, Brooks, Nightingale . . . **Pam Dain** at Jones Wheeler, **Jenny Beckman-Curzan** at Damitz, Brooks, Nightingale and **Fiona Lofgreen** at Bartlett, Pringle & Wolf were also a great help! ! Congratulations—once again—to our winners:

April Felipe - \$500
Miguel Torres - \$1,000 (Kristi Johnson Award)
Travis Wilson - \$500
Jennifer Park - \$500
Timothy Wilder - \$750 (Donna Valle Award)
Rachel Lewis - \$1,000 (Wendy Johnson Award)

Institute of Management Accountants—Santa Barbara Chapter, January 2002 Dinner Meeting

Wednesday, January 9, 2002

James R. Peters, Partner, Ernst & Young will present the **Income Tax and FASB Update** at the
The Elephant Bar and Restaurant, 521 Firestone Drive in Goleta · 805-964-0779
 5:30 p.m. Board Meeting/Attitude Adjustment · 6:00 p.m. Dinner · 6:30 p.m. Program
 Members \$25.00 · Guests \$25.00 · Students \$12.50 · Non-Members \$25.00
 Please RSVP to Rebecca at 745-2171 or e-mail Rszerwo@venocoinc.com

**Happy Birthday to you,
Happy Birthday to you,
Happy Birthday dear...**



Belated December birthday goes out to:
Brenda Rogers
 (our only Xmas baby??)

January 2002 celebrants:

Pam Lombardo,
Diane Ravenscroft,
Leslie Yoon and
Olivia Rojas

(Is your birthday not here? Then . . . get with the program and email Diana Dahlen . . . Otherwise don't forget to bring a raffle gift to the upcoming dinner meeting !!)

How well we communicate is
 determined,
 not
 by how well we say things,
 but
 by how well we are understood.

- - Andrew S. Grove



ASWA's SANTA BARBARA CHAPTER

cordially invites you to attend our upcoming dinner meeting
featuring our guest speakers

Seth Streeter and Brad Stark
Founders and Principals of Mission Wealth Management
who will discuss

Maximizing Qualified/NonQualified Plans and Staying Out of Court:

Retirement planning and the new GUST rules
Compensation planning hurdles
Rules to follow to be compliant with DOL and ERISA

**Join us on Monday, January 14th at 5:30 pm at
Andria's Harborside**

located at 214 State Street (across from the train station) 564-4677

Members \$22 • Guests \$25 • Students \$12

Please choose one of the following dinners:

Certified Angus Sirloin Steak

Wood fired, served over spiced onions with port wine sauce and steak butter

Fresh Fish Fillet

Prepared in our pistachio nut crust topped with beurre blanc

Free Range Chicken Breast

Wood fired and topped with herb butter

Shrimp Piccata

Shrimp sauteed in garlic-caper sauce, served over linguine

Portabello Mushroom Ravioli

With roasted tomato cream sauce

Beverage, dinner salad and dessert included.

For reservations please contact Lisa @ Kate Silsbury's office: 687-0355 OR

Diane via email at ddonohue@hendry.com

PLEASE RSVP NO LATER THAN FRIDAY, JANUARY 11TH

Standing reservations: Leslie Yoon, Barbara Shaw, Pam Lombardo, Sherri Mauler

About our speakers . . .

Seth Streeter and Brad Stark are graduates from UCSB. Brad and Seth are the founders and principals of Mission Wealth Management, LLC a registered investment advisor. Brad is a Certified Financial Planner Licensee and Chartered Mutual Fund Counselor. Seth holds a Masters of Science in Financial Planning as well as a Certified Financial Planner License. Experience: Brad and Seth have assisted hundreds of individuals and business with their financial planning over the last 10 years. They have presented to a number of corporations and private organizations on various financial planning issues including The Gillette Company, Northrop Grumman Corporation, The Betty Ford Center, The Gas Company, The University of Southern California, and the Los Angeles Unified School District.

Issues & Interests . . .

Leading and Delegating by Gail Anikouchine, Area Director

Learning to lead in ASWA often requires volunteering on a committee. On such a committee, one can learn many skills such as time management, listening etc. What of teaching the future leaders? For those who are committee chairs, how can you, the leader, convey what you have learned about leading to those who are eager to learn? One of the first lessons a leader learns is that she cannot single-handedly save the world. The committee chair sets an example of leading as she delegates the several tasks needed to accomplish a goal. When delegating, the chair needs to assess the people who are there to help in terms of experience and ability. The leader needs to determine if the person helping accomplish the task at hand needs a lot of explanation or a minimal amount. The leader should convey her expectations along with the goals, the performance standards, and the timeline for completing the task. By delegating even the smallest of tasks, the leader is broadening the base of volunteerism in ASWA and instilling the seeds of confidence that will empower women and enable them to achieve.



A very big thanks to our new CPA review donor . . . Roger Philipp, CPA

***Roger Philipp CPA Review
1288 Columbus Avenue #278
San Francisco, CA 94133
email: roger@rogercpareview.com
www.RogerCPAreview.com
(415) 346-CPA***

- **Hurry Enroll Early!!!** Live Classes for the **May 2002 Exam** start **Jan 5 & 6 in San Jose and San Fran.**
 - **NEWSFLASH!** **Roger Philipp, CPA** will be holding **LIVE** classes in **L.A.** for the **NOV 2002 Exam!**
 - **No live course in your area?** No Problem, we tape our 100% Live course and offer a VIDEO COURSE that includes all course materials. Get over 100 hours of classroom instruction with our video course. 9 FARE classes, 7 ARE classes, 6 Audit Classes, and 6 Business Law classes comprise the 4 Part Course Parts are available Individually for Sale. **ORDER NOW! Online**
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MARK YOUR CALENDARS !!

Monday, January 14th at 5:30 pm . . .

Monthly Dinner Meeting

Guest Speakers: Seth Streeter and Brad Stark, Mission Wealth Management

Topic: Maximizing Qualified/NonQualified Plans and Staying Out of Court

Location: Andria's Harborside

Wednesday, January 16th at 5:30 p.m . . .

Monthly Board Meeting

at Walpole & Co. located in The Galleria at 3891 State Street, Santa Barbara - 569-9864

Monday, February 11th at 5:30 pm . . .

Monthly Dinner Meeting

Guest Speaker: Frank B. Gilb, Jr., Raytheon Security

Topic: Identity Theft

Location: Victoria's Cafe

THE MISSION OF THE AMERICAN SOCIETY OF WOMEN ACCOUNTANTS IS . . .

TO ENABLE WOMEN IN ALL FIELDS OF ACCOUNTING TO ACHIEVE THEIR PERSONAL, PROFESSIONAL AND ECONOMIC POTENTIAL AND CONTRIBUTE TO THE FUTURE DEVELOPMENT OF THE PROFESSION.

**American Society of Women Accountants
c/o Diane Donohue, Committee - Corresponding Secretary
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Goleta, CA 93117**

