

# ASWA

American Society of Women Accountants

Volume XXIII, Issue 13

Santa Barbara Chapter #122

July 2002

**ASWA**  
P.O. Box 20048  
Santa Barbara, CA 93120  
(805) 566-7172

**PRESIDENT**  
Pam Lombardo  
UC Santa Barbara  
(805) 893-4448  
plombardo@housing.ucsb.edu

**PRESIDENT ELECT &  
NEWSLETTER**  
Diana L. Dahlen  
Damitz, Brooks, Nightingale  
(805) 963-1837  
ddahlen@dbntm.com

**VICE PRESIDENT**  
Paige McClelland  
Jones McClelland Group  
(805) 320-6553  
ladyconst@aol.com

**TREASURER**  
Barbara Shaw  
Delco System Operations  
(805) 961-7776  
bjshawsb@aol.com

**CORRESPONDING  
SECRETARY**  
Diane Donohue  
Hendry Products  
(805) 571-8231  
ddonohue@hendry.com

**RECORDING SECRETARY**  
Fiona Lofgreen  
Bartlett, Pringle & Wolf  
(805) 963-7811  
fiofgreen@bpw.com

**DIRECTORS**  
Lisa Maass  
Diane Ravenscroft  
Leslie Yoon  
Fiona Lofgreen

**NATIONAL HEADQUTRS.**  
1-800-326-2163  
aswa@aswa.org  
www.aswa.org

**LOCAL WEBSITE**  
www.aswasb.org

## PRESIDENT'S MESSAGE

What a month, and what a year! I can't believe how quickly the time passed. This is my last President's letter and I want to thank all of you for your support, and I would like you to join me in welcoming our new President, Diana Dahlen.

Diana chaired her first meeting at the Transition meeting on June 15th, and she did an excellent job. You will be hearing more about our exciting plans for the future from Diana, the new Board, and other members from the chapter, as we gear up for the new year.

At this time, I would like to reflect on the past year. We met our member retention goal of 58 members. We did not meet our participation goal of 80% of our members attending 4 or more events; however 58% of our members did attend 4 or more events, and many of these attended 10 or more events. We have a very active chapter! We also gained 12 new members, and we raised more than \$5,000 for scholarships.

I want to thank the Board for all of their support. Diana Dahlen – President Elect and Newsletter Editor extraordinaire; Paige McClelland – Vice President and See's Candy coordinator; Diane Donahue – Corresponding Secretary and dinner meeting reservations; Fiona Lofgreen – Recording Secretary, Director, and Student Night organizer; Barbara Shaw – Treasurer and special advisor to the President on all matters large and small; and our Directors, Leslie Yoon, Lisa Maas and Diane Ravenscroft. Your support and enthusiasm helped to make this a very special year. I can't thank you enough!

We had an outstanding program committee this year. Diane Ravenscroft, Jean Smith, Leslie Yoon, & Jenny Beckman-Curzan did a superb job of organizing and planning an excellent variety of programs – they provided a wide assortment of dining venues, selected excellent speakers and technical topics, and arranged some very nice social events. Thank you Diane, for doing an outstanding job chairing this committee!

Our Scholarship committee, Tricia Krout, Christy Janka, Sue Smith, and our Student Night committee, Fiona Lofgreen, Pam Dain, & Jennifer Park presented us with an excellent group of scholarship winners and speakers. We auctioned off a review course for \$1,200, so next year's committee will be off to a good start. This event continues to be one of my many favorite things about ASWA. The cake was an added nice touch, too!

We had 3 wonderful social events; Disneyland – thanks to Sherri Mauler for keeping up the tradition; Holiday Auction – thanks to Linda Nelson for planning this very successful fundraiser; and thanks Diane for organizing Golf at the beautiful Sandpiper golf course to top off tax season.

Continued . . .

## IN THIS ISSUE

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



## SANTA BARBARA CHAPTER ANNOUNCEMENTS

### PRESIDENT'S MESSAGE (Continued) . . .

Other committee members I would like to thank include Jenny Beckman-Curzan for Membership; Tricia Krout, Barbara Shaw and Sherri Mauler for Nominating, Kate Silsbury for Publicity; Olive Wall for the Website; and Ways and Means – Laurie VonStraussenburg, Jeanette Cambron, Paige McClelland, and Linda Nelson.

Thank you all again. I feel very fortunate that you all allowed me this great opportunity to be your president, and I look forward to another wonderful year with ASWA as your Treasurer.

*Pam*

### Get Well Wishes . . .

To Paige McClelland's son, Rob. He is in our thoughts and prayers.

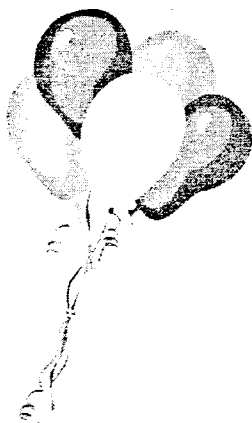


***Happy Birthday to you,  
Happy Birthday to you,  
Happy Birthday dear...***

Jean Smith, Lisa Maass  
& Carol Walker (June)

Olive Wall &  
Catherine Black (July)

(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 !!)



The bitterest tears  
shed over graves  
are for words  
left unsaid  
and  
deeds left undone.

— Harriet Beecher Stowe

## ASWA's SANTA BARBARA CHAPTER

cordially invites you to attend our upcoming  
joint dinner meeting with Cal Society

featuring our guest speaker

Edward C. Thoits, Partner  
with Mullen & Henzell, L.L.P., Attorneys at Law

who will discuss

### Employment Law

Join us on Monday, July 8th at 5:30 pm at  
**Moby Dick's Restaurant**

*located at 220 Stearns Wharf in Santa Barbara • 965-0549*

**Members \$25 • Guests \$27 • Students \$12**

**Please choose one of the following dinners:**

Fresh Fish

Chicken or

Steak Sandwich

(vegetarian pasta also available)

For reservations please contact Lisa @ Kate Silsbury's office: 687-0355 OR  
Diane Donohue via email at [ddonohue@hendry.com](mailto:ddonohue@hendry.com)

**PLEASE RSVP NO LATER THAN FRIDAY, JULY 5th**

**Standing reservations: Barbara Shaw, Pam Lombardo, Sherri Mauler & Diana Dahlen**

---

### About our speaker . . .

Ed assists business owners and human resource professionals with finding solutions to employment law problems including wrongful termination claims, overtime disputes, discrimination complaints and leave of absence dilemmas. Ed's practice emphasizes a proactive approach to employment issues, helping clients avert and effectively resolve employment problems before they develop into major conflicts. When necessary, however, Ed aggressively defends his client's interest in litigation. He searches for ways to achieve quick dismissal of claims through summary adjudication, and regularly assists clients with resolving disputes on favorable settlement terms through direct negotiation, mediation, and other alternative dispute techniques.

Ed is an instructor on Employment Law for the University of California Santa Barbara extension, a frequent speaker on employment issues for the Council on Education in Management, and the author of numerous articles on employment related topics. He has a BA, with distinction from Stanford University, and a JD, Order of the Coif from the University of California at Los Angeles.

---

## Issues & Interests . . .

### *Local Job Opportunity*

#### **QAD is actively recruiting for a Senior Accountant**

Interested parties are invited to apply by e-mail to Tom Adam, Technical Recruiter, QAD Inc. at [tma@qad.com](mailto:tma@qad.com), or the preferred method: through QAD's website at [www.qad.com/company/careers/](http://www.qad.com/company/careers/). Additional information can be obtained by calling Tom directly at 805-566-6029.

#### **Position Description:**

Responsible for all aspects of third party royalty reporting and assists Accounting Manager with consolidated royalty reporting matters as they arise. Prepares various accounting reports and monthly balance sheet analysis. Duties are performed according to generally accepted accounting principles.

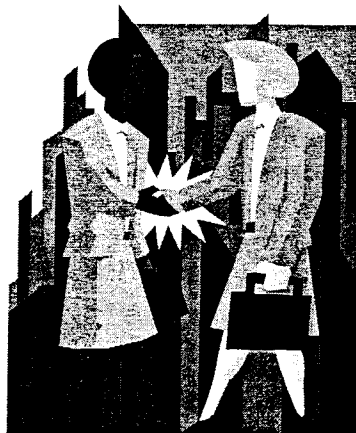
1. Responsible for Third Party Royalty Reporting including accruals, expense analysis, and payment processing. Ensures that all royalties are in compliance and reporting is filed timely and in accordance with the legal agreements. Communicates with members of the Alliance, Customer Administration and finance departments to ensure consistent application and accountability of royalty reporting.
2. Responsible for account reconciliation and analysis, posting journal entries, maintenance of and preparing reports and performing segments of the monthly close.
3. Performs monthly balance sheet account analysis.
4. Other duties include preparation and review of regional financial statements, adhoc report requests, and special assignments as needed.

#### **Qualifications:**

Bachelor's degree with an emphasis in Finance or Accounting. Minimum four years experience in a financial or accounting related environment. Multinational public company and hi-tech/software industry experience preferred.

#### **Special Knowledge & Skills:**

Strong written and oral communication, detailed oriented, time management, and organizations skills. Knowledge of MS office tools, Lotus Notes and MFG/PRO general ledger software preferred. Self-starter who will display initiative in identifying and solving problems, as well as where efficiencies can be gained. Team player.



Our Chapter sincerely thanks the following people and companies for their support!



**Citywide**  
SEARCH ASSOCIATES

Direct Placement of  
Accounting Personnel

Lindy Graham, CPC  
Recruiter, President

1825 State Street, Suite 106  
Santa Barbara, CA 93101

Phone: 569-2831  
Fax: 682-8807  
e-mail: jobs@citywidesb.com

www.citywidesb.com



**Kate Silsbury**  
Business Financial Advisor  
Personal Financial Advisor

**Financial  
Advisors**

**American Express Financial Advisors Inc.**  
IDS Life Insurance Company  
Suite 4  
1625 State Street  
Santa Barbara, CA 93101

Bus: 805.687.0355 • Fax: 805.687.8294  
Lic: CA 0681569

**ROBERT HALF AND  
ACCOMTEMP'S SALARY GUIDE**

**RIGHT ON THE MONEY!**

Call to connect directly with your local office and receive your **FREE** copy, or visit our websites at [accountemps.com](http://accountemps.com) and [roberthalf.com](http://roberthalf.com)

Oxnard • 805.485.1778  
Santa Barbara • 805.568.0838  
Westlake Village • 805.496.2805



**ROBERT HALF.**  
Specialized Financial Recruiting<sup>SM</sup>



**accountemps.**  
Specialized Financial Staffing<sup>SM</sup>



**We Help  
Small Business  
Succeed™**

- **Quicken/Quickbooks**® Checks and Forms
- **Accounting Software**, Installation, Training, Support & Y2K Conversions
- **Laser & Continuous** Checks and Forms for All Software Packages
- **Business Printing**: Forms, Labels, Envelopes, Stationery, Letterhead, etc.
- **"One Write"** Manual Bookkeeping Systems


**G.A. COOK & ASSOCIATES**  
3324 State St., Ste. M • Santa Barbara, CA 93105  
(805) 682-9977 • Fax (805) 687-9973  
email: [sbscook@callamerica.net](mailto:sbscook@callamerica.net)  
[www.safeguard.org/sbscook](http://www.safeguard.org/sbscook)

**Do you have Common Sense?**

*We are financial planning and consulting firm, who will work with you to craft the customized financial roadmap you need to achieve success. We offer these services for an HOURLY or FIXED FEE:*

**Comprehensive Financial Planning** – includes investments, retirement plan, insurance needs, estate plan and cash and tax management.

**Business Consulting** – includes tax and operating strategies. We also offer help in the financial aspects of divorce, inheritances and 401(k) rollovers.



**Meriann Plamondon**  
Common Sense Financial Solutions  
Phone 805-966-5446  
Visit us at [www.commonsense.net](http://www.commonsense.net)

**Life Can Be Complicated.**

All of these services and more are available at one place, through one relationship.

- COLLEGE PLANNING • RETIREMENT PLANNING • ESTATE PLANNING
- TRUST MANAGEMENT • FOUNDATION MANAGEMENT • STOCKS
- BONDS • MUTUAL FUNDS • CD's • MONEY MARKET CHECKING
- BUSINESS LINES OF CREDIT • CASH MANAGEMENT PLANS
- SMALL BUSINESS AND CORPORATE RETIREMENT PLANS
- FINANCIAL EDUCATION PROGRAMS

Keep it simple. Free your mind. Enjoy your life.

**Simone Byers, Financial & Retirement Plan Consultant**  
(805) 564-7964 OR (800) 874-0282

**SALOMON SMITH BARNEY**  
SEE HOW WE EARN IT™

Salomon Smith Barney does not provide tax or legal advice. Please consult your tax and/or legal advisor for such guidance. Salomon Smith Barney is a registered service mark of Salomon Smith Barney Inc. © 2001 Salomon Smith Barney Inc. Member SIPC. A member of citigroup.



# MARK YOUR CALENDARS !!

**Monday, July 8th at 5:30 pm . . .**

**Monthly Dinner Meeting**

Guest Speaker: Edward C. Thoits, Partner with Mullen & Henzell, L.L.P., Attorneys at Law

Topic: Employment Law

Location: Moby Dick's Restaurant

**Wednesday, July 17th at 5:30 p.m . . .**

**Monthly Board Meeting**

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

**Monday, August 5th at 5:30 pm . . .**

**Monthly Dinner Meeting**

Guest Speaker: TBA

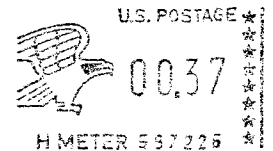
Topic: TBA

Location: TBA

**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  
55 Castillian Drive  
Goleta, CA 93117



**Happy 4th of July**

