

# ASWA FAX RETURN

**American Society of Women Accountants — Houston Chapter No. 33**

Member of *The Federation of Houston Professional Women*

VOL. 52 No. 8

April 2004

## JOINT ASWA/AWSCPA MEETING

**2 Hours CPE**

**April 27, 2004**

Topic: What Every Woman Should Know About  
Wealth Transfer Planning and Estate Preservation

Speaker: Stephanie Donaho  
Locke Liddell & Sapp LLP

Prerequisite: None Required

Course Level: Basic

Method: Discussion with Outlines Provided  
Administrative Policy: Per ASWA standing  
rules, if you register and do not attend you will be  
charged the \$25.

Where: The Briar Club  
2603 Timmons Lane  
(corner of Westheimer and Timmons Lane)  
Parking is available in the member parking area  
across the street from the Briar Club

Time: 5:30 p.m. Networking  
6:15 p.m. Dinner  
7:00 p.m. Speaker

### Official National Registry Statement

ASWA is registered with the National Association of  
State Boards of Accountancy (NASBA) as a sponsor  
of continuing professional education on the National  
Registry of CPE Sponsors. State Boards of  
Accountancy have the final authority on the  
acceptance of individual courses of CPE credit.  
Complaints regarding registered sponsors may be  
addressed to the National Registry of CPE Sponsors:  
150 Fourth Avenue, Nashville, TN 37219-2417.  
Telephone 615-220-4200. Web site: [www.nsba.org](http://www.nsba.org)

## Meeting Prices

- \$25 Members with reservations
- \$30 Members who do not make reservations
- \$30 Guests
- \$15 CPE only (no dinner)

**RSVP by 4/22/04 to Judy McMillian at:  
713-529-9871 (H)  
rhart96@aol.com**

The Chapter will bill for reservations that are not cancelled  
prior to the meeting.

The chapter meets on the 4th Tuesday of each  
month except December (holiday party) and May  
(annual luncheon).

**Reservations need to be made by the Thursday  
preceding the meeting. Special dietary re-  
quests available on request.**

CPE Contact: Kelly D. Bennett  
Contact Address: c/o Margolis, Phipps & Wright  
1400 Post Oak Blvd, Suite 900  
Houston, TX 77056-3009

## ASWA National Headquarters

800-326-2163

Web site: [www.aswa.org](http://www.aswa.org)

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**Empowering Women In The Accounting and Financial Professions Since 1938**

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Deadline for May newsletter: May 9, 2004  
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**Additions and changes to the mailing list should be submitted to Kathy Pearce**  
 Home: 713-688-4057  
 Work: 713-831-5412  
 Email: Kathryn\_pearce@aigvalic.com

**Standing Reservations**

Loyce Anderson	Melanie Norton
Colene Blankinship	Kathy Pearce
Kelly Bennett	Eunice Reiter
Judy McMillian	Mary Simpson
Ellie Moore	Ann White
Kajal Nagrani	Lisa Wilson

The Chapter will bill for reservations that are not cancelled by noon Thursday prior to the meeting.

Please contact Judy McMillian to be added or deleted from the Standing Reservations List.

H—713-529-9871 rhart96@aol.com

**CALENDAR OF EVENTS**

- Apr 24 Community Service Project, Loaves & Fishes Soup Kitchen, 2009 Congress, 9 a.m.—1 p.m.
- Apr 27 ASWA/AWSCPA Meeting (see page 1)
- May 11 Board Meeting
- May 18 Annual Public Relations Luncheon
- May 20-22 South Central Regional Conference—Omaha, NE
- May 20-22 NW Regional Conference—Billings MT
- May 20 AWSCPA Mini-seminar (see page 4)
- June 4-6 SW Regional Conf—Phoenix AZ
- June 22 Membership Meeting—Installation of officers
- July 27 Membership meeting
- Aug 24 Membership meeting
- Sept 28 Membership meeting
- Nov 10-12 ASWA/AWSCPA Annual Conference

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## ANNUAL PUBLIC RELATION LUNCHEON

### May 18, 2004

The annual public relation/scholarship luncheon will be held on Tuesday, May 18, 2004. Our speaker for the luncheon will be Rachel Seff Koenig, Ed.D. The topic of discussion will be “Choose Your Attitude.” The meeting will be held at the Post Oak Grill, 1415 South Post Oak Lane, Houston, TX 77056. Networking and check-in begins at 11:30 with lunch served at 12.

Reservations are necessary and must be made by Friday, May 7, 2004. The price is \$30 per person with a choice of entrees upon arrival. Also, the chapter will bill for reservations made but not cancelled by Friday, May 7, 2004.

Rachel Koenig is the National Manager of Recruiting and Development for Consolidated Graphics, the largest commercial printing company in the United States. She directs college recruiting, training and development, and leadership and succession planning for this \$780M public company with 66 business units in 25 states.

A Yankee by birth and a Texan by choice, Rachel received her undergraduate degree from George Washington University and her Master’s Degree from Texas A&M University. She completed her doctorate in Educational Leadership at the University of Houston in 2001.

She is well known to the academic and corporate community having served as the Director of Career Services at the University of Houston College of Business Administration and the Coordinator of Career Services for the University of Houston Law Center. She has also directed admissions and marketing for the Rice University MBA Program.

“Dr. Rachel” has fifteen years of experience in human capital planning, both at the individual and corporate level and is the co-author of “60 Minutes to Success: The Ultimate Guide to Power Lunching.”

**In order to make this public relations and scholarship luncheon a success, I ask that each of you invite at least two colleagues, friends or family members that are interested or involved in accounting to attend this function.**

**Ann White  
President-Elect**

**PRESIDENT'S MESSAGE****Ellie Moore**

We are in such a busy time of the year. With tax returns, year end financial statements, payroll reports, 10Q's, etc., the work just never seems to end. For our students, finals are just around the corner. If you love to garden, now is the time to work and plant. With kids, it is probably soccer, baseball, or some other type of activity.

ASWA is busy also.

Our April meeting is going to be a joint meeting with AWSCPA so plan to come, visit with our sister organization, enjoy a wonderful speaker and attend the monthly business meeting right after the speaker. We also have a service project planned for the 24<sup>th</sup>. I hope you have called in and plan to assist. For us it is fairly simple, doesn't take much time, and the rewards are lots of smiles. And don't forget the nominating committee. They are working very hard to put a slate of officers together. This slate will be presented at the meeting, so please, step up and assist where ever you can. ASWA does not work if you don't.

May holds the Annual Scholarship Luncheon. This is a great meeting to bring your employer, co-workers, friends, family, etc. We present the history of ASWA and reflect on our goals and mission – to empower women in accounting. Get those reservations in so this can be a truly great event.

In June, make plans to attend the "transition" board meeting. Our installation of officers will be the focus of the monthly meeting with a "fun" topic on hand-writing analysis.

Our fiscal year is winding down, but we do not want you to. Our contest for meeting attendance, helping with committees, writing articles, etc. is still going on. If you haven't checked your points lately, contact Kajal and see where you stand. It is easy to get some extra points and possibly win that prize.

See you at the meeting!

**Federation of Houston Professional Women (FHPW)**

[www.fhpw.org](http://www.fhpw.org)

ASWA Delegates:	ASWA Alternates:
Melanie Norton	Pam Ahlers
Kathryn Pearce	Ellie Moore

**NOMINATING COMMITTEE**

This year's nominating committee is comprised of Colene Blankinship, chair, Eileen Neucere, and Deborah McKenney.

If you are interested in serving on the board of the Houston Chapter of ASWA, please contact them. Serving on the board as an officer or director is a great way to develop your leadership skills. These skills are "job transferable" and will make you a valuable asset not only to ASWA but also to the company you work for.

For more information about serving on the board or to volunteer, contact one of the nominating committee members. Contact information or Colene Blankinship and Eileen Neucere can be found on page 2 of this newsletter. Deborah McKenney's email: [dmckenney@immucor.com](mailto:dmckenney@immucor.com)

**REMEMBER:** This is your organization.

**AWSCPA MINI-SEMINAR**

The American Woman's Society of Certified Public Accountants will hold its Spring Mini-seminar on at 5:30 p.m. on Thursday, May 20, 2004 at the Sheraton Brookhollow Hotel, 3000 North Loop West.

Topic: The A, B, C's of Bankruptcy and Taxation  
CPE: 2 Hours

Speakers: Joan Kehlhof and Charles Wist,  
Attorneys at Law, Wist Holland & Kehlhof, LLP

Cost: \$35 members, \$40 guests if postmarked by May 12. \$45 at the door

Reservations call Ellen McMurrey, 281-489-1822

**SPEAKER PROFILE**

**Houston Chapter ASWA MEMORIAL FUND**

Stephanie Donaho is a partner in the law firm of Locke Liddell & Sapp, LLP. She practices in the areas of estate planning, probate, trust and estate law, transfer taxation, asset protection, and related fields.

Ms. Donaho received a Juris Doctor degree, with High Honors from the University of Texas School of Law in 1981 and was licensed to practice in Texas that same year.

*Texas Monthly* magazine recognized Stephanie Donaho in 2003 as one of the Top 50 Women Attorneys in Texas.

She has been a frequent author/speaker at Texas State Bar and other continuing legal education seminars and co-authored the Texas Board of Legal Specialization Exam (Estate Planning Section) (1992-1995).

One way that we fulfill our mission is through the awarding of scholarships to deserving accounting students.

These scholarships are presented each year at our annual luncheon. The recipients are students that have shown dedication and outstanding academic achievement. The financial assistance we provide is recognition of their efforts and achievements.

We are able to make these awards thanks to the generous contributions of our members, friends and supporters. Through your contribution to the Memorial Fund, you are personally contributing to the future development of the accounting profession.

Please consider making a contribution to honor friends and loved ones. Your gift does make a difference.



**I would like to make a contribution to the Houston Chapter ASWA Memorial Fund**

**Amount \$ \_\_\_\_\_**

**In Memory of**

**In Honor of**

*Print Name* \_\_\_\_\_  
*(individual is deceased)*

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*(Name/Relationship)* \_\_\_\_\_

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*(City State Zip)* \_\_\_\_\_

*(City State Zip)* \_\_\_\_\_

Make checks payable to  
Mail to

ASWA Memorial Fund  
c/o Eunice H. Reiter  
5005 Woodway, Suite 200  
Houston, TX 77056

## **PERSONAL MARKETING: PROTOCOL FOR SAVVY PROFESSIONALS**

**By: Marsh Petrie Sue, MBA**

Do you meet professional people who have forgotten simple protocol and etiquette? “Please” and “thank you” will never go out of style. Common courtesies and protocol create a positive image for you, the savvy professional.

In the first 30 seconds of meeting someone, people make subconscious judgments based on what they see, hear and sense. Personal marketing is how you establish your brand. When you walk into a room, what is the message you send? Do you easily engage in conversation or is this a struggle? How is your table etiquette? How do you tackle tricky food, like crab legs? From business casual to the formal events, tailor your awareness for success in today’s workplace. Learn to project more power, confidence and credibility. The following are some simple reminders:

### **#1 Small talk**

- Originality—Think differently than the crowd. Don’t agree with everything said just to go along with the ideology. Be well-read, listen to talk radio and be original in your theories.
- Excitement and Positive Attitude—Have the great attitude and energy of a person with a purpose. No one likes being around a dower soul. It’s depressing and people don’t really care anyway. Fake it till you make it, because you really do become what you think about.
- Hobbies and interests—You need other interests besides working. This is what it means to “get a life.” If you don’t have one, get one. You should do this anyway so you are more interesting and well-rounded.
- Conversational Ability—The ability to communicate on a level that can be understood and that is exciting. Interesting small talk, which is difficult for many people, just takes a little focus and practice.
- Have you ever met someone for the first time and walked away saying, “Now that was interesting.” Chances are the conversation was led by the other person and was about you and not about them. Eliminate the autobiographical focus.

### **#2 Breaking the ice**

To break the ice of the first conversation, try to be smart and play a little game with your potential communication target. Here are six quick tips:

- Try to learn as much information about them as you can. These make wonderful topics for starting unconventional chat. It always boosts the conversation, and usually you can learn enough to keep the conversation rolling.
- You discovered that the other person is interested in movies and you know nothing. Ask open-ended questions to go deeper into their knowledge. If you are a movie aficionado, steer away from talking about your favorite movie, scene or theater, but rather ask them about their favorites.
- Ask questions. As mentioned above, ask open-ended questions that begin with why, how, when, where or what. These typically can’t be answered with a simple “yes,” “no,” or “maybe,” or even a grunt. Instead try something like: “So, what was your favorite part of Sex and the City?”
- Get involved. Try your hand at chatting in a crowd. Groups of people get together and—as they say—shoot the bull. See if you can tell a joke or be witty or bring up an interesting tidbit of information. Bring energy into the conversation.
- Don’t bring up or analyze your problems.

(Continued from page 6)

- Don't brag about yourself and your accomplishments. Instead, focus on your prospect's interests.

Whenever you're faced with a dilemma, focus on the solution rather than on the difficulty. Think and talk about the ideal solution to the obstacle.

### **#3 Personality**

What makes up "personality?"

- **Mystery**—The self-control to keep certain secrets and avoid telling everybody everything about you. This is the biggest mistake people make. It's all about themselves, their past life and their success. Think empathetically: ask interesting questions, know enough to encourage them to tell you more and don't fake it. Included in this should be your willingness to let them be mysterious too—don't pry too much into their personal life.
- **Humor**—Make them laugh, be happy, optimistic and forward thinking. Keep a smile on your face or at least a pleasant look. Humor is the quickest way to engage another human being, so use it and don't take yourself (or for that matter, the other person) too seriously.
- **Stay positive** and develop an attitude of gratitude unless you already have one. You become a magnate to other people just by staying up and forward thinking.

### **#4 Dress code**

Don't know how to dress? Call ahead and find out what is appropriate. Can't do that? Dark slacks, a shirt or blouse and a sport jacket will get you by in just about any circumstance. The important part is to be clean, neat and well put together.

**Women:** Don't dress provocatively. This detracts from others taking you seriously. Understate your jewelry unless you are in the fashion industry. John T. Moloy, in his dress for success, has found that conservative is better; you are looked at as a savvy professional and create a more professional image.

**Men:** Have your shoes polished frequently. Understand the dress norm in your environment and be open to suggestions. Don't know how to dress? Visit a clothing store that will help you!

### **#5 Table etiquette**

Know how to hold a knife and fork. Your professionalism is affected immediately if your social graces are lacking. Have you seen someone hold a knife like a dagger or their spoon like a shovel? If you do not know appropriate etiquette, go to the library and read. Also, pay attention to how others use utensils and table service. It is appalling how many people have no clue that this is even important.

There are other, subtler traits that could be talked about in boring detail, but these are the important aspects of projecting a winning personality.

Sign up for Marsha's fabulous "Sue News" monthly on line magazine. It's free!!  
<http://marshapetriesue.com/newsletter.html>

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**PRINTING AND POSTAGE  
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**COMMUNITY PROJECT:**

This is a reminder that the Houston Chapter of ASWA will be participating in a community project on April 24, 2004 at the Loaves and Fishes Soup Kitchen located at 2009 Congress. This address is 2 blocks from Minute Maid Park under Hwy 59. Everyone should park in the lot next to the Loves and Fishes on Algiers Street. We will help cook, serve and clean up.

We will meet at 9:00 a.m. and will be finished by 1:00 p.m. The phone number is 713-224-1373.

The CPE Rules for AICPA and State Boards vary. Attendees are responsible for their individual state requirements. We feel the seminar presented will qualify in most states.

Registered with the TSBPA as a sponsor of continuing professional education. State boards of accountancy have final authority on the acceptance of individual courses.

The FAX RETURN is the newsletter of ASWA Houston Chapter 33. It is published monthly, except December. You can receive the Fax Return by email or by snail mail. **Please let the editors know which form you would like to receive the newsletter.**

**ADVERTISING RATES**

The ads are to be emailed to the newsletter chair no later than the 1st of the month in which the ad is to appear.

\$300/ year—full page  
\$160/ year—1/2 page  
\$ 10/ month—business card size

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