

ASWA FAX RETURN

American Society of Women Accountants — Houston Chapter No. 33 www.aswahouston.org

Member of *The Federation of Houston Professional Women*

VOL. 55 No. 1

July 2006

Membership Meeting

1 hour CPE
July 25, 2006

PRESIDENT'S MESSAGE

by: **Lisa Wilson**

Topic: "Developments in Roth Contributions to 401(k) and 403(b) Plans"

Speaker: Michael Pettey

Pre requisite: None required

Course level: Basic

Where: The Briar Club

2603 Timmons Lane
(corner of Westheimer and Timmons Lane)

Parking available in the member parking area across the street from the Briar Club. Valet parking is available.

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

Prices: \$25 Members with reservations
\$30 Guests and walk-ins
\$15 Students
\$15 CPE only (no dinner)

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Dear Professional Women,

2005-2006 ASWA year was TERRIFIC for the Houston Chapter. Thinking back, the challenge to all members was to increase membership by 10 and invite at least one guest to each meeting. That challenge paid off for the Houston Chapter. Thank you Eileen for your leadership and guidance.

As President of the Houston Chapter for 2006-2007, I want to add three areas of focus for the chapter: more networking, increased member participation on committees and scholarship fundraising for students. The chapter will continue the root focus of increasing membership, providing low-cost, high quality CPE and monthly FAX Return publication.

All committee chairpersons have sent emails inviting members to participate on their committees. The response has been great, let's keep that up. Member participation is important for the continued growth and success of the chapter. Please call or email the committee chairperson if you are interested in participating on their committee.

I am looking forward to another great year for the ASWA Houston Chapter.

2005-2006 Officers & Committee Chairs

President H 832-445-0543 W 281-894-5253	Lisa Wilson comberge@yahoo.com F 281-807-1520	Director H 713-660-8728 W 713-221-8596	Orapin Duangploy duangployo@uhd.edu F 713-226-5238	Student Activities
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Vice President H 281-659-7508 W 713-986-3129	Sonia Calloway scalloway@bdo.com C 281-659-7508	Programs	Kathy Pearce H 713-688-4057 W 713-831-5412	Newsletter papandkap@aol.com F 713-831-8653
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Deadline for August newsletter: August 8, 2006
 Newsletter Editor: Kathryn Pearce
 Home: 713-688-4057
 Work: 713-831-5412
 Fax: 713-831-8653
 Email (home): papandkap@aol.com

Additions and changes to the mailing list should be submitted to Eileen Neucere
 Home: 281-894-5253
 Fax: 281-807-1520
 Email: aggie1978@earthlink.net

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 editor know which form you would like to receive the newsletter.**

Standing Reservations

Loyce Anderson	Melanie Norton
Colene Blankinship	Kathy Pearce
Sonia Calloway	Eunice Reiter
Julianne Dorsett	Ann White
Suzi Martin	Lisa Wilson
Eileen Neucere	
Debbie McKenney	

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

Please contact **Melanie Norton** to be added or deleted from the Standing Reservations List.
 713-353-1942 mnorton@bvccpa.com

CALENDAR OF EVENTS

- July 11 Board Meeting—American General Center
- July 24 FHPW Quarterly Meeting—Hess Club
- July 25 Membership Meeting—Briar Club
- Aug. 8 Board Meeting—American General Center
- Aug. 22 Membership Meeting—Briar Club
- Sept 12 Board Meeting—American General Center
- Sept 18-20 Joint National Conference—Bally Hotel
Las Vegas
- Sept 26 Membership Meeting—Briar Club

For more information or to sign up, please contact Melanie Norton at mnorton@bvccpa or by phone

Houston ASWA Memorial Fund

The Houston ASWA Memorial Fund was chartered in 1973 with the two-fold purpose of:

- Providing scholarships to deserving accounting students
- Furthering the mission of the American Society of Women Accountants -- “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”.

The Memorial Fund receives contributions, in lieu of flowers, for members and their loved ones during times of grief. We receive contributions to celebrate special occasions and in honor of special people.

Please consider the ASWA Memorial Fund as an opportunity to honor or to memorialize the people in your lives.

Contributions should be made payable to:

ASWA Memorial Fund
c/o Eunice H. Reiter
5005 Woodway, Suite 200
Houston, TX 77056-1789

If your contribution is in honor or in memory of someone, be sure to include information regarding where to send the acknowledgement.

STORAGE PLACE FOUND.

Lisa Wilson has volunteered the “Texas Basement” in her home to store the ASWA archives now being stored by Ellie Moore.

If you want to know what a “Texas Basement” is ask Lisa at the next membership meeting.

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

The Fax return is published monthly except December.

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. Web site: www.nsba.org.

CALLING ALL CUB REPORTERS

The FAX RETURN is looking for reporters to assist in writing the newsletter. If you would like to learn how to put together and publish a newsletter, then this job is just right for you.

Helping on the newsletter will only take about an hour a month so you have plenty of time for other things, like family, work, etc.

Please contact Kathryn (Kathy) Pearce at any of the numbers listed on page 2 of this newsletter.

New Member Profiles

Krisit DeNardo

Kristi was born and raised in Shelby County in Deep East Texas. She grew up on a farm, and her earliest memories are driving a tractor, bush-hogging, plowing crops, and feeding cows. Kristi is the youngest of five kids (4 girls, with our brother sandwiched in the middle).

Kristi attended Stephen F. Austin State University in Nacogdoches, TX, where she obtained her BBA in accounting with a minor in finance. Kristi also secured a provisional secondary teaching certificate, and completed the coursework for an MBA in accounting with secondary emphasis in management.

Just after completing the MBA coursework, and before having an opportunity to take the comprehensive exams, Kristi married the love of her life and they were transferred to Elkhart, IN almost immediately. Kristi and her husband spent 4 1/2 years in Indiana. Kristi's husband is an engineer, with a specialty in valve design. They were then transferred to Reynosa, Mexico. They spent almost exactly a year there, and Kristi worked as the general accounting manager for Datacom Custom Manufacturing, who made printers for TI and other brandings. They were then transferred back to northern Indiana, where she was employed by Holy Cross Health System as a corporate staff accountant. Her company merged within 3 months and her position was moved to Detroit, MI. Declining the move she went to work for Elkhart Plastics, Inc., a rotational plastics molding company as Assistant Controller. Within 6 months her husband had been transferred to Chattanooga, TN.

Kristi spent the last 5 1/2 years employed by Gordon Biersch Brewery Restaurant Group, Inc, a chain of upscale casual dining restaurants, with a microbrewery in each. Kristi left there in March of this year as regional controller with responsibility for 15 restaurants and one nightclub.

On a personal note, Kristi has two grown sons. The eldest has completed his degree in mechanical engineering and joined the Navy, where he has almost completed flight training, with an emphasis in helicopters. He is engaged to a terrific girl from Nashville, who is also in the Navy. They are stationed in Pensacola. The younger son has spent a few years trying to decide what he wants to do, and has finally chosen something and will begin further schooling this fall.

Kristi and her husband are active in a number of sports, including 4-wheeling, motorcycling, SCUBA diving, white-water rafting (they just got into last fall), and jet-skiing. They have two adorable canine children -Samantha, a 15-year old black cocker spaniel, and Harrison, a 4-year old Japanese spitz.

Kristi has been an active member of ASWA for the past 5 years, and has served in several offices, most recently as chapter president in Chattanooga. She am excited about the opportunity to serve as director and chair of the membership committee in Houston, and look forward to developing friendships with other chapter members. I have also been an active member of the Institute of Financial Accountants for the past 5 years, and have served in several offices in that organization as well.

Welcome to ASWA Houston Chapter Kristi!!

New Member Profiles

Sharon D. Jones

Sharon was born in Northeastern New Jersey, and attended Kent State University. She graduated with a BA in Justice Studies in 1980. She is employed with Centerpoint Energy Houston Electric Company. She is a Billing Analyst in their Financial Services/Revenue Accounting group. She is married to Eric and they have 2 children, Shayla and Erika. Sharon enjoys reading (esp. to children), traveling, attending live performances, bike riding and walking. She is a sports fan, devoted to basketball. Her favorite team is the New Jersey Nets and Cleveland Cavaliers. She enjoys watching college ball as well, Kent State Golden Flashes, University of Connecticut and Rutgers. Sharon is a lifetime member of the Girls Scouts of the USA, where she is a cadette troop committee member, a member of the Fort Bend County Libraries-Friends of the Missouri City Branch Library where she holds the position of Exec. Board Secretary. Sharon is also a member of the Alpha Kappa Alpha Sorority serving as Awards Committee Chair, a member of the Texas Library Association, The Ensemble Theatre and the Museum of Fine Arts-Houston.

[Welcome to ASWA Sharon!](#)

Nancy Wiginton, CPA

Nancy has been a CPA for approximately 16 years. She attended the University of Texas and earned a BBA degree in Finance. Nancy started her career in banking, and then became a financial analyst with Electronic Data Systems in Dallas. After that she worked for a large travel agency in Houston for several years as their CFO. Nancy has been in public accounting for seven years now. She works part time with Seale and Associates, P.C. and is involved with tax consulting and preparation. Nancy also compiles and reviews financial statements. Nancy is married with two children. She enjoys photography and traveling, and hopes to take up golf one day soon. Nancy was a member of the ASWA chapter in Dallas many years ago and is happy to now be a member of the Houston chapter.

[Welcome to ASWA Nancy!](#)

Kimberla Ann Lawson

Kimberla has one son, 3 yr old Joshua Climenty Lawson, and a family dog, named Barkley, which is a white fuzzy 10 lb. Mutt. Kimberla grew up in a small town in Kansas (Burlington, KS) and then spent a few years in Kansas City. She moved to Houston the end of 1991 and has been here ever since. Kimberla graduated with a BS in Accounting from University of Houston, she is currently employed at KPMG as a Manager in the Audit practice. Her hobbies include reading non-fiction, listening to music, cycling, hiking and camping. Kimberla also enjoys all kinds of outdoor activities, especially baseball activities with her son, including going out to dinner with friends; singles events with her Sunday School class. Kimberla also enjoys traveling.

[Welcome to ASWA Kimberla](#)



Dear Committee Chairpersons,

I would like to schedule a Saturday for us to meet and discuss the focus of each committee and what we want to happen this term. I have blocked out 3 Saturdays for your selection as first choice, second choice or third choice.

This meeting will allow us to introduce ourselves and brainstorm on ideas that we can put into place for the 2006-2007 term of ASWA Houston Chapter. Please invite those members that will be participating on your committee, their attendance is needed as well. I have already met with the Program Chairperson and the Student Activities Chairperson.

Please select from one of the dates below as 1st, 2nd or 3rd choice also please advise what time you would like to start the meeting and email me back with that information:

July 22, 2006 _____ 9:00am to 11:00am _____ or 10:00am to 12:00noon _____

July 29, 2006 _____ 9:00am to 11:00am _____ or 10:00am to 12:00noon _____

Once a date has been finalized, I will forward location and directions for meeting.

I want to thank each of you for your acceptance in chairing a committee for the 2006-2007 ASWA Houston Chapter term. I look forward to working with each you to accomplish the goals set for the chapter. Whatever I can do to assist you, please do not hesitate to call on me.

Thanks
 Lisa M. Wilson
 President
 ASWA Houston Chapter #033

SPEAKER BIO

Mike Pettey has more than 30 years experience in pension design and administration, group health programs, and life and disability insurance. In 1991, he started Alliance Benefit Group of Houston, Inc. to serve the 401(k) market for small and mid-size companies. He is a graduate of The University of Texas at Arlington, where he majored in finance and math. He is a Fellow of the International Society of Employee Benefit Specialists, a Certified Employee Benefit Specialist, and a Certified Pension Consultant. He served as President of Retirement Administrators and Designers of America. Mike is a member of the Texas Business Association, National Life Underwriters, National Health Underwriters, International Society of Certified Employee Benefit Specialists, and American Society of Pension Actuaries. Prior to starting ABG, Mike was Vice President and Trust Officer of a large Texas Banking and Business Holding Company from 1968 to 1974; Vice-President of Custom Benefit Services, Inc., and President of First Actuarial Corp. of Texas, Inc.

COMMITTEE SPOTLIGHT

MEMBER RELATIONS COMMITTEE

The responsibility of the member relations committee is retention of members. The committee should conduct periodic surveys of the membership to determine the needs of the members and work with the other committees to better meet those needs.

This committee should personally contact members who have not paid their dues by October 1 to find out if they are going to continue as members. The committee needs to determine how the chapter can better meet the needs of those who do not want to continue as members and encourage them to retain their membership. The committee should also contact members who have missed several meetings. The committee should develop a new member orientation program.

Federation of Houston Professional Women (FHPW)

The Federation of Houston Professional Women is an alliance of women's professional organizations, chartered by the state of Texas as a non-profit, non-partisan business league. Each FHPW member organization, although diverse in style and structure, has professional or businesswomen members focused on education, networking, specific careers or community service.

FHPW offers quarterly events designed to bring its diverse membership together to promote a place of POWER and INFLUENCE. Quarterly events are open to both members and guests and allow Houston professional women the opportunity to network, have some fun and learn something new

Web site: www.fhpw.org	
ASWA Delegates:	ASWA Alternates:
Melanie Norton	Pam Ahlers
Kathryn Pearce	Eileen Neucere

Next quarterly Meeting: July 24, 2006
 Location: At H.E.S.S Building
 5430 Westheimer

Saluting the 2006 Women of Excellence
 “The Silver Stars Debut”.

Plan to attend

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ASWA
American Society of Women Accountants
Kathryn Pearce
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Houston, Texas 77092

Return Service Requested

**Printing and Postage Compliments of
Kathryn Pearce, CPA**

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Region 4—South Central Area Directors—

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jvassar@deloitte.com

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