

# The Monthly Balance Sheet



American Woman's Society of  
Certified Public Accountants

of Houston

Volume 32, Number 2

August 2006

## AUGUST'S MEETING

### *We Can't Go On Meeting This Way*

**Course Objective:** To educate the attendees on methods of conducting effective meetings. To discuss techniques for effective planning based on the purpose of the meeting. To learn to lead meetings for optimal participation while obtaining meeting objectives within the time frame of the meeting. To discuss methods of following up with meeting participants when successive meeting for projects is required.

Speaker:	Dianne L. Metcalf, CPA
Topic:	We Can't Go On Meeting This Way
Date:	August 17, 2006
CPE:	1 hour

**Course Level:** Basic, no pre-requisites

**About the Speaker:** Dianne Metcalf has over 11 years of experience in the staffing and recruiting industry including start-up and management of branch offices for two staffing firms before starting her own recruiting firm, Metcalf Resources in January 2002. She is a licensed CPA and officer of the Houston CPA Society serving as Director 2004-2006 and Secretary 2006-2007 and continues to be an active participant on a number of committees. Prior to moving to the recruiting industry, Dianne worked in the oil & gas industry for a public exploration and production company where she was the Controller and Treasurer and was also an officer of the company.

Outside of her CPA activities Dianne is one of the founding members and officers of MindSpeak Toastmasters started at the CPA Society, and the President of SYSCO's Toastmasters 2005-2006 and 2006-2007. Community involvement includes participation in Priority Associates A.M., Boy Scouts of America and Crossroads.

Dianne says she is a "self -help" junkie and is typically reading 3-4 books how to....books at a time. She loves movies and popcorn and lives in Katy, Texas with her husband Jim of 27 years and their 12 year old son, Kyle.

### \*\*\* Reservations Policy \*\*\*

Meeting reservations must be called in or canceled by 5:00pm on the Friday **PRIOR** to the meeting. The price for dinner reservations called in after 5:00pm Friday (walk-ins) is \$35. The regular price for members is \$25, for non-members is \$30. For those members on the standing reservations list, the price is \$25 and for students is \$20. Our arrangements chair is Stephanie Sawyer. Her phone number is (832) 338-0311. We cannot accept credit cards for payment. **IF YOU MAKE A RESERVATION AND DO NOT ATTEND, YOU MUST PAY ANYWAY.** We pay for all meals reserved regardless of whether they are used.

### \*\*\* Standing Reservations \*\*\*

It's a new year, **so please confirm your standing reservations with Stephanie Sawyer this month** so that she will know whether or not to keep you on the list. If you are coming regularly to the dinner meetings, you might want to consider adding your name to the standing reservations list so that you will always have a reservation. The downside is that if you can't come, you will have to remember to cancel, or you will have to pay for a dinner that you didn't attend.



## ***President's Letter***

And we're off.....Off to a good start in another year for AWSCPA. We have started a new chapter in the life of AWSCPA. Thanks to a number of new faces and a few returning ones we have now filled all the affiliate officer and committee positions. The infusion of new blood has given our group a new energy. A positive energy that I hope will be noticed by you, our members, when you attend the dinner meetings. One good thing about having a dynamic group such as ours is the exchange of ideas and experience between the existing members and the new members. I know I have benefited immensely from this nurturing and mentoring environment. This "mentoring" was one of the reasons I chose to become involved with AWSCPA. It is my hope that many of you will also experience this benefit.

Another benefit to being involved with the Houston Affiliate is the opportunity to enhance your organizational and planning skills while assisting the group with the dinner meetings, the Mini Seminars, and especially the Annual Seminar. It doesn't matter what skill level you have, or how little time you have available. We can find a job to suit your needs, from just being an idea generator, to finding speakers, to calling and / or emailing meeting reminders to your fellow members. Just let us know what your time and talents are.

As we begin the New Year for our group, we are in the process of obtaining dinner speakers and of course, planning for our Annual Seminar. Any assistance would be welcome. Brenda Banks, a former affiliate president, used to say "Many hands make light work." And so I urge you to get involved! What you get out of AWSCPA most definitely correlates to what you put into it.

Until our next meeting....

**Gilda Mendoza**  
**2006-2007 President AWSCPA Houston Affiliate**

### **Mentor Affiliate Program**

**Wendy Lewis**, National Director-West, and Past President of our Affiliate, would like our membership to consider starting a mentor affiliate program, where we would assist with the formation of a new affiliate for AWSCPA. Wendy would like the membership to consider starting with the Huntsville area, which consists of a 3-4 county area. CPA's in this area need continuing professional education hours, and it would be possible to begin by arranging some joint meetings in their area with the Houston Affiliate. If you have comments, input, or additional ideas please contact **Wendy Lewis**, [wendyl@wt.net](mailto:wendyl@wt.net).

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## Member News and Announcements

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**Welcome** – to new member **Audrey Orda**.

**July's Meeting** – Our speaker, Brent Wells, surprised most of us with the high percentage of mediators and arbitrators who are CPAs. He gave us a very interesting and informative presentation on the purposes, differences and comparative advantages of litigation, mediation and arbitration, and gave us some examples of disputes in which a CPA's training is needed.

**Annual Seminar** – We had our first planning meeting on July 22<sup>nd</sup>. Many thanks to Susan Taylor for hosting it at her spacious house. Susan is definitely the hostess with the mostess. She provided a wonderful and delicious brunch for us. An enthusiastic, albeit small, group met and decided on the schedule and most of the speakers. The date is February 3, 2008. Many thanks to Susan Taylor, Jane Tillinghast, Phyllis Martin, Ellen McMurrey, Uzma Chowdhury, and Gilda Mendoza for taking the time out of their Saturday morning to meet. Thanks also

to Kathryn Harriss, Mary Ross, and Patty Hunt. Although they were not able to be present at the meeting they have graciously agreed to be part of the committee and have been assigned jobs. We still need a breakfast speaker and a vendor liaison. If you would like to volunteer and / or have ideas for a speaker, please contact one of the people listed above.

**General Gossip** – The Greater Houston Regional Managing Director of Merrill Lynch has invited **Brenda Banks** to a recognition dinner for her success in their Path of Achievement program. Kathryn Harriss dislocated her shoulder and will have surgery the first week in August. We wish her a speedy recovery.

**Race for the Cure** - The Susan B Komen Race for the Cure will be on Saturday, September 30, 2006. For race information or registration, see [raceinfo@komen-houston.org](mailto:raceinfo@komen-houston.org).

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### Federation of Houston Professional Women

The third quarterly meeting took place on July 24<sup>th</sup> at the Hess Club. The FHPW is a network of professional women's organizations in the Houston area. Attending a meeting provides an opportunity to network with other professional women. The Women of Excellence for 2006 were introduced, including our own Joan Khosla, at this meeting. As a recipient of the WOE, Joan will be honored along with the other WOE's at the FHPW Women of Excellence Gala on September 16, 2006 at the Hyatt Regency Downtown. The event is a formal dinner and awards banquet. Per Rhonda Ryan, a past WOE honoree, the event is a lot of fun. Tickets are \$65 per individual. Reservations must be made by September 6. If you are interested in going, contact Gilda Mendoza. She is going to try to get a table reserved. More information on FHPW can be found at their website [www.fhpw.org](http://www.fhpw.org).

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### ASWA/AWSCPA Joint Inspired Solutions Conference

Las Vegas, Nevada, Bally's Hotel  
Monday, September 18 - Wednesday, September 20, 2006

In addition to the four tracks of high quality CPE listed in the brochure on Monday morning at 11:00 am we shall have our traditional Membership Exchange. Every Affiliate that sends an individual to the Exchange will receive \$250. We Texans should have no problem getting 23 hrs of CPE at the Conference. All the personal development sessions are part of a 4 part track where there are plenty of other options for CPE. The open sessions present topics that well within Texas CPE requirements. If you have not received a brochure, go to [www.awscpa.org](http://www.awscpa.org). We do not know how long it will last, but there seems to be a price war between SW and Continental so for a limited time round trip tickets to Vegas and back are under \$200.

## THE CALL COMMITTEE



- **Sarabeth Boothe** – (713) 356-6828 [slboothe@sbcglobal.net](mailto:slboothe@sbcglobal.net) Anderson through Cooper
- **Susan Sexton** – [susan2890@sbcglobal.net](mailto:susan2890@sbcglobal.net) Courtright through Hintzman
- **Stephanie Tate** – [southgurt@yahoo.com](mailto:southgurt@yahoo.com) Hochstetler through Martin-Worthington
- **Ivana Shumberg** – (713) 623-8911 [ivana@ws-cpa.com](mailto:ivana@ws-cpa.com) Mathew through Pels
- **Myra Pickett** – (832) 768-0520 [txtaxsmart@sbcglobal.net](mailto:txtaxsmart@sbcglobal.net) Petty-McKinney through Staples
- **Jolly Mathew** – (713) 660-7862 [kallour@aol.com](mailto:kallour@aol.com) Sternbaum through Yoesting

If you do not wish to be reminded of a meeting by the call committee, contact the member in your range. Otherwise enjoy the luxury of momentarily having a personal assistant remind you to make a reservation for a dinner meeting. If you are on the standing list, use this as a reminder to come to the meeting or to cancel so that you will not have to pay for an unattended meeting.



**Phyllis Martin, CPA\***  
**Financial Services**

3 Greenway Plaza, Suite 1700  
Houston, TX 77046  
Phone 713-402-3850  
Cell 713-206-6481  
Fax 713-961-0153  
[pmartin@finsvcs.com](mailto:pmartin@finsvcs.com)

**AWSCPA Houston Affiliate Title Sponsor**



\* This firm is not a CPA firm.



## **Job Opportunities**



Uptime Institute in Santa Fe, New Mexico is looking for a Controller with 10 years of experience who is proficient with QuickBooks Enterprise and Number Cruncher. Send resume and salary requirements to [careers@uptimeinstitute.org](mailto:careers@uptimeinstitute.org).

DDI Executive Recruiting, Inc. has been retained to find an Assistant Treasurer for a client headquartered in Houston. Preferred qualifications include a bachelor's degree and 10 years experience in accounting or finance with 5 years treasury experience, a knowledge of hedge accounting and FAS 133, and familiarity with tax-exempt bond financing, knowledge of or experience with interest rate swaps and foreign currency issues. Base salary \$150K. Donna Chapman [donna@ddiexec.com](mailto:donna@ddiexec.com) or [www.ddiexec.com](http://www.ddiexec.com).

Patricia Hrabina, Director of Human Resources for Fox Networks Engineering & Operations, is looking for a Project & Fixed Assets Accountant for a 2 year project here in Houston. Knowledge of E-1 PeopleSoft: 2003 PeopleSoft Enterprise, 8.10 would be helpful. (713) 821-7504 [Patricia.Hrabina@foxsports.net](mailto:Patricia.Hrabina@foxsports.net).



**The Houston Affiliate**  
Invites you to attend  
***The Fall Mini Seminar***  
Thursday, September 28, 2006

***Featuring the intriguing topics of Professional Liability in Accounting and Human Resources***

*This seminar is a two part presentation –Liability in the Accounting Profession and Employment and Discrimination Liability.*

***Liability in the Accounting Profession*** will be presented by Jeffrey Johnston of Vinson & Elkins. In this presentation, Jeff will explain the provisions of Texas law, the federal securities laws, and the rules and regulations of the Texas State Board of Public Accountancy and Public Company Accounting Oversight Board governing accountants. Jeff will discuss recent enforcement actions of the PCAOB and the SEC and their impact on public companies. This is a presentation that is relevant to all CPAs – regardless of whether they are in public accounting, industry, or in private practice.

***Employment and Discrimination Liability*** will be presented by Bob Newhouse and Jennifer Bass. They are attorneys with Resources Global Professional. This presentation will focus on the liability exposure CPAs encounter in the course of their job as a manager or supervisor involved in the interviewing, hiring, and termination process.

Place: Resources Global Professionals  
2700 Post Oak Blvd., Suite 1600  
Houston, Texas 77056  
(Air Liquide Building – attached to the Galleria)

Time: 5:30 – 6:00 pm Registration and Snack Supper CPE: 3 hours  
6:00 – 7:40 pm Accountants' Liability Level: Basic  
7:40 – 8:30 pm HR Liability Prerequisites: None

Cost: \$40 members, \$45 non-members if registered by September 21, 2006  
\$50 after September 21. Standing reservations do not apply.

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***Please mail registration and seminar fee payable to AWSCPA to:  
Anna Marie LaPorte, 811 Pinemont Drive, Houston, Texas 77018***

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Firm: \_\_\_\_\_  
Phone: \_\_\_\_\_ Email: \_\_\_\_\_

For more information email Anna Marie LaPorte at [jalprrt@sbcglobal.net](mailto:jalprrt@sbcglobal.net) or call 281.433.3618



**Houston Affiliate**  
**Fiscal Year 2006 to 2007**  
**Officers and Committee Chairs**

**AFFILIATE OFFICERS**

Position	Name	E-Mail	Work or Cell	Home
President	<b>Gilda Mendoza</b>	gmendoza@kanaly.com	(713) 582-0561	(713) 926-3389
Vice-President	<b>Mary Ross</b>	Maross1977@aol.com	(409) 789-9160	
Secretary	<b>Uzma Chowdhury</b>	anmeer@yahoo.com	(281) 798-8634	(281) 550-9171
Treasurer	<b>Ellen McMurrey</b>	emcmurrey@nwebs.com		(281) 489-1822

**Committees and Other Positions**

Position	Name	E-Mail	Work or Cell	Home
Annual Seminar Team	Gilda Mendoza	gmendoza@kanaly.com	(713) 582-0561	(713) 926-3389
	Barbara Courtright	barbcourtright@houston.rr.com		(713) 991-2355
	Kathryn Harriss	kharris2@yahoo.com	(713) 320-8388	(713) 681-2669
	Phyllis Martin	pmartin@finsvcs.com	(713) 402-3850	(713) 780-9006
	Jane Tillinghast	jtillinghastcpa@aol.com	(713) 681-7558	(713) 688-3531
Arrangements	Stephanie Sawyer	ssawyer@sbcglobal.net	(832) 338-0311	(281) 367-8434
Charter Renewal	Phyllis Martin	pmartin@finsvcs.com	(713) 402-3850	(713) 780-9006
Civic Project	Race for the Cure			
Database & Labels	Patty Hunt	pahunt@earthlink.net	(713) 447-1115	(713) 524-2428
Ex-Officio	Jane Tillinghast	jtillinghastcpa@aol.com	(713) 681-7558	(713) 688-3531
Fall Mini-Seminar	Anna Marie LaPorte	jalprt@sbcglobal.net	(281) 433-3618	(713) 694-8042
Federation Delegates	Rhonda Ryan	rhonda@rhondaryan.com	(713) 686-2697	(713) 686-2697
	Brenda Banks	brenda_banks@ml.com	(281) 374-5328	(281) 812-2413
Historian	Sue Bailey	suebailey_nl@yahoo.com	(713) 247-2466	(713) 520-1903
IRS Delegate	open			
Job Bank	Rhonda Ryan	rhonda@rhondaryan.com	(713) 686-2697	(713) 686-2697
Membership	Annette Williamson	netwilliamson@sbcglobal.net	(713) 501-0039	(713) 862-8988
Nat'l Director-West	Wendy Lewis	wendyl@wt.net	(713) 622-9933	(281)558-8782
Nat'l VP-Publications	Jane Tillinghast	jtillinghastcpa@aol.com	(713) 681-7558	(713) 688-3531
Programs/Speakers	Mary Ross	Maross1977@aol.com	(409) 789-9160	
Publicity	Wanda Llorens	wellor@earthlink.net	(713) 952-5102	(713) 952-5102
Scholarship & Education outreach	Jacqueline Pierson	jtpiersoncps@yahoo.com	(832) 816-4481	
Spring Mini-Seminar	Brenda Banks	brenda_banks@ml.com	(281) 374-5328	(281) 812-2413

A Complete Member Directory can be searched or downloaded from the Member's Section of the national website, [www.awscpa.org](http://www.awscpa.org). Our affiliate website, [www.awscpa.org/houston](http://www.awscpa.org/houston), has a schedule of upcoming events.

**AMERICAN WOMAN'S SOCIETY OF  
CERTIFIED PUBLIC ACCOUNTANTS**

c/o Patricia A. Hunt  
1415 Hyde Park Blvd. #B  
Houston, TX 77006-2503

**ADDRESS CORRECTION REQUESTED**

**Meeting Date:** Thursday, August 17, 2006

**Location:** Sheraton Brookhollow

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**UPCOMING MEETING CALENDAR**

<i>Date</i>	<i>Speaker - Topic</i>
August 17, 2006	Conducting Effective Meetings – Dianne Metcalf, CPA
September 28, 2006	Professional Liability in Accounting & Human Resources – Jeffrey Johnston, Bob Newhouse & Jennifer Bass
October 19, 2006	New CPA/Member Dinner, Topic TBA



Sheraton Brookhollow  
3000 N. Loop West  
Houston, TX 77018

Registration: 5:30 pm  
Dinner: 6:00 pm  
Speaker: 6:45 pm

Reservations due by: Friday, August 11, 2006