

The Monthly Balance Sheet

Volume 33, Number 1

AWSCPA

American Woman's Society of
Certified Public Accountants

of Houston

August 2007

AUGUST'S MEETING

* Newsletter Changes *

The affiliate has decided to go paperless beginning **July 2007**. We will continue to mail hardcopy newsletters to any current member who requests them, but otherwise will circulate on e-mail. As always, copies of the newsletter will be posted on our website at

www.awscpa.org/houston. If you wish to receive hardcopy newsletters, please notify **Patty Hunt**, the AWSCPA Database Chair at 713-524-2428, 713-447-1115 or pahunt@earthlink.net. If you wish to correct or change your e-mail address, please notify pahunt@earthlink.net and www.awscpa.org.

Pat Davion, Recording Secretary of the **Federation of Houston Professional Women**, has agreed

to briefly speak and provide information about the Federation just prior to our regular program at our meeting this month.

This organization is another excellent way to network with other professional women in the Houston area. Pat will speak for about 10 minutes beginning at around 6:45 PM and answer any questions our members may have about the Federation. Then we will have our regular program beginning at 7 PM.

Speaker:	Fritz Koehler, CIC CRM
Topic:	Risk Management – Are You Prepared for the Hurricane Season?
Date:	August 16, 2007
CPE Cr.:	1 hour
Sponsor #:	000052

The speaker for the August dinner meeting is **Fritz Koehler**. His topic is "**Risk Management – Are You Prepared for the Hurricane Season? Assessing Your Insurance Needs for a Disaster**" The objective of the session will be to give everyone an idea of how to

prepare a disaster plan for your company or assist your clients in their plan preparation and identify the role insurance will play in that plan and the recovery from the catastrophic loss.

Fritz serves as the Head of Sales and Marketing for **Wells Fargo Insurance Services of Texas, Inc.** Licensed as a Risk Management Consultant and a Commercial Insurance Broker, Fritz provides risk management and commercial insurance guidance in the areas of risk avoidance, risk retention, and risk transfer to his clients. His expertise lies in large retail and distribution operations, manufacturing firms, and property management companies. Fritz is in the top 3% of the agents in the United States in size of book of business and has led Wells Fargo Insurance (previously Acordia of Texas, Inc.) in new business sales for the past nine years.

Continued on page 4

Brenda Turner Banks
Financial Advisor- Merrill Lynch

Global Private Client Group
20333 SH 249 Ste 550
Houston, Texas 77070
(281) 374-5328
brenda_banks@ml.com

AWSCPA Houston Affiliate Title Sponsor



President's Letter

We had a very successful and productive Retreat on Thursday, July 19, 2007 at the offices of Joan Khosla. I want to thank Joan for opening up her office to all of us that attended and making all the arrangements for that evening. The 2007-08 Board of Directors were introduced that evening and are the following:



Mary Ross, President; Uzma Chowdhury, Secretary; Susan Taylor, Treasurer; Stephanie Sawyer, Arrangements Chair; Patty Hunt, Database/Labels Chair; Annette Williamson, Membership Chair; Rhonda Ryan, Federation Delegate; Phyllis Martin, Federation Delegate; and Gilda Mendoza, Past President. I want to thank these ladies for agreeing to serve on the 2007-08 Board.

The main purpose of our Retreat was to organize and plan for our 2007-08 year which began on July 1, 2007. My goals for the 2007-08 year are to focus on the following:

- Provide quality Continuing Professional Education programs and networking opportunities for our members;
- Put together a 2008 Annual Seminar for our members that would provide a variety of choices in the different areas of our profession including leadership topics;
- Evaluate and adopt guidelines and criteria to select additional ways to provide financial assistance to individuals that wish to further their education and/or training in the accounting profession.

Our next scheduled membership meeting and presentation will be on Thursday, August 16, 2007 at the Sheraton Brookhollow on the topic of "Are You Prepared for the Hurricane Season?" to be presented by Fritz Koehler. The 2008 Annual Seminar Committee will meet subsequently after this presentation to begin organizing the Annual Seminar which will be held at the H.E.S.S. Club on Saturday, February 2, 2008. In addition to the 2008 Annual Seminar Committee, I would like to encourage all Board members and anyone else interested in assisting with this event to attend.

Mary Ross
2007-2008 President
AWSCPA Houston Affiliate

Joint Meeting of AWSCPA Houston 2008 Annual Seminar Committee & Board **Thursday, August 16, 2007**

(Immediately Following the Program)

Agenda

Call to Order

Business & Reports

- Organization of 2008 Annual Seminar
- Announce Voting Results of 2006-07 Financial Review Selection
- Review/Adopt 2007-08 Budget Line Items Presented by Treasurer Susan Taylor

Any Other Business, Announcements, or Comments

Adjourn

Member News and Announcements



Welcome – New member Virginia McDavid who attended the planning meeting in July.

July Planning Meeting – We had good attendance at this year's planning meeting. Present at

the meeting were: **Virginia McDavid, Anna Marie LaPorte, Cynthia Cox, Susan Taylor, Mary McDonald, Patty Hunt, Frances Weatherly, Wendy Lewis, Stephanie Sawyer, Mary Ross, Annette Williamson, Kathryn Harriss,** and our hostess, **Joan Khosla.**

Assignments for future programs were discussed. The board members present voted to purchase an LCD projector for use at the meetings and the annual seminar. (It is cheaper to own than to rent.) We also started working on speakers for the Annual Seminar and a partial list of assignments was made. Susan Taylor is to update the Annual Seminar manual for the committee to use.

2007 Women of Excellence Awards – **Phyllis Martin** has been chosen to be our WOE winner. The Gala is scheduled for Saturday, September 29, 2007. This is a fun event and everyone is invited. The



price is \$60/seat, spouses, friends, family, etc. are welcome. It's a nice evening out, great food, no need to buy a long dress; plenty of people were there in just regular nice evening attire. It's a great way to support Phyllis for everything she has done for the organization and get our name out there. Contact Joan Khosla (joan@khoslas.com) if you are interested.

AWSCPA Sponsor number – Joan Khosla reports that when we complete our CPE forms for our state license, we need to add 4 Zeroes in front of the AWSPCA's sponsor number. So use "000052". Joan was being brave and trying the new automated license renewal process and got stuck when the software wanted a 6 digit number versus the 4 digit number that we have always used. Thanks for being first Joan!

Race For The Cure – Mark your calendars – the **2007 Komen Houston Race for the Cure** is **Saturday, October 6, 2007** at Sam Houston Park – Downtown Houston. Member and Past President, **Jane Tillinghast** has led an AWSCPA team for the last few years. For more information visit: www.komen-houston.org.

THE CALL COMMITTEE

- **Sarabeth Boothe** – (713) 356-6828 slboothe@sbcglobal.net Anderson through Chowdhury
- **Susan Sexton** – susan2890@sbcglobal.net Courtright through Hsieh
- **Stephanie Tate** – (972) 207-8071 smtate@uh.edu Hunt through McMurrey
- **Mary McDonald** – (713) 256-4450 mary.mcdonald99@earthlink.net Mendoza through Pozzi
- **Audrey Orda** – (832) 640-9020 ordaa@stthom.edu Prather through Shumberg
- **Irene Ritchie** – (281) 970-1760 irenertch@yahoo.com Tate 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.



Houston Affiliate

2008 Annual Seminar Committee Members

Saturday, February 2, 2008

H.E.S.S. Club Building
Houston, Texas

Name	E-Mail	Work or Cell	Home
Annette Williamson	netwilliamson@sbcglobal.net	(713) 501-0039	(713) 862-8988
Cynthia Cox	ccox@cynthiacoxcpa.com	(281) 827-3328	
Joan Khosla	joan@khoslas.com	(713) 862-9200	
Kathryn Harriss	Kharriss2@yahoo.com	(713) 320-8388	(713) 681-2669
Mary McDonald	mary.mcdonald99@earthlink.net		
Mary Ross	maross1977@aol.com	(409) 789-9160	(409) 741-0593
Patty Hunt	pahunt@earthlink.net	(713) 447-1115	(713) 524-2428
Stephanie Sawyer	ssawyer@sbcglobal.net	(832) 338-0311	(281) 367-8434
Susan Taylor	staylora@sbcglobal.net	(281) 233-1354	(713) 781-7649
Wendy Lewis	wendyl@wt.net	(713) 622-9933	(281) 558-8782

Speaker profile continued from page 1

Fritz has had articles published in The Houston Business Journal regarding insurance market trends in American Agent and Broker on sales methodologies and he conducts regular continuing education credit seminars for Certified Public Accountants on business insurance. In addition, Fritz has spoken at the annual meeting of the Texas Society of CPA's in Galveston and Houston, the Louisiana Society of CPA's, and the Texas Bar Association. He has also addressed the local chapters of the Texas Society of CPA's in Victoria, Texas and the Golden Triangle in Beaumont, Texas. Fritz has also conducted sales training for Frost Bank and for Wells Fargo Bank.

Prior to joining Wells Fargo Insurance Services, Fritz was Vice President of Operations for Hahn & Clay, a pressure vessel fabricator and served as Manager of Sales and Marketing for Engineers and Fabricators Company, a heat exchanger manufacturer. Earlier in his career he was the Division Manager for the Grayloc Piping Products Division of Gray Tool Company.

Fritz earned his BBA and MBA from Texas A&M University in 1971 and 1972, respectively, prior to joining the U.S. Army and serving as a platoon leader in the 82nd Airborne Division at Fort Bragg, North Carolina.

Direct Line 713-507-4752
 FAX 713-507-9452
 Email Fritz_Koehler@wellsfargois.com

Has your contact information changed? Please submit all corrections to pahunt@earthlink.net and AWSCPA at www.awscpa.org.



Houston Affiliate
Fiscal Year 2007 to 2008
Officers and Committee Chairs

Updated: 8/6/07

AFFILIATE OFFICERS

Position	Name	E-Mail	Work or Cell	Home
President	Mary Ross*	maross1977@aol.com	(409) 789-9160	(409) 741-0593
Secretary	Uzma Chowdhury*	anmeer@yahoo.com uchowdhury@hanover-co.com	(281) 798-8634	(281) 550-9171
Treasurer	Susan Taylor*	staylora@sbcglobal.net	(281) 233-1354	(713) 781-7649

Committees and Other Positions

Position	Name	E-Mail	Work or Cell	Home
2007-08 Program Committee	Mary Ross*	maross1977@aol.com	(409) 789-9160	(409) 741-0593
	Brenda Banks	brenda_banks@ml.com	(281) 374-5328	(281) 812-2413
	Anna Marie LaPorte	jalprt@sbcglobal.net	(281) 433-3618	(713) 694-8042
	Wendy Lewis	wendyl@wt.net	(713) 622-9933	(281) 558-8782
	Gilda Mendoza	gmendoza@kanaly.com	(713) 582-0561	(713) 926-3389
	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
Call Committee	Jane Tillinghast	jtillinghastcpa@aol.com	(713) 681-7558	(713) 688-3531
Charter Renewal	Mary Ross	maross1977@aol.com	(409) 789-9160	(409) 741-0593
Database & Labels	Patty Hunt*	pahunt@earthlink.net	(713) 447-1115	(713) 524-2428
Ex-Officio	Gilda Mendoza*	gmendoza@kanaly.com	(713) 582-0561	(713) 926-3389
Fall Leadership Seminar	Wendy Lewis	wendyl@wt.net	(713) 622-9933	(281) 558-8782
Federation Delegate	Rhonda Ryan*	rhonda@rhondaryan.com	(713) 686-2697	(713) 686-2697
Federation Delegate	Phyllis Martin *	pmartin@finsvcs.com	(713) 402-3850	(713) 780-9006
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
Newsletter Editor	Kathryn Harriss	Kharriss2@yahoo.com	(713) 320-8388	(713) 681-2669
Publicity	Wanda Llorens	wellor@earthlink.net	(713) 952-5102	(713) 952-5102
Scholarship & Education outreach	Sue Bailey	suebailey_nl@yahoo.com	(713) 247-2466	(713) 520-1903
Spring Mini Seminar	Anna Marie LaPorte	jalprt@sbcglobal.net	(281) 433-3618	(713) 694-8042

***Board Member names are in boldface.**

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

Has your contact information changed? Please submit all corrections to pahunt@earthlink.net and AWSCPA at www.awscpa.org.

**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 16, 2007

Location: Sheraton Brookhollow

UPCOMING MEETING CALENDAR

<i>Date</i>	<i>Speaker – Topic</i>
August 16, 2007	Fritz Koehler - Risk Management
September 20, 2007	TBA
October 20, 2007	Fall Leadership Conference & New CPA/Member Welcome
November 15, 2007	Michele Stanton - Revenue Recognition
December 2007	Holiday Break – No Program



Sheraton Brookhollow
3000 N. Loop West
Houston, TX 77092

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

Reservations due by: Friday, July 10, 2007