

MARCH'S MEETING

Insurance Alphabet Soup – Good For Your Health

Course Objective: To assist CPAs to get the best healthcare insurance quotes for their own or their clients' businesses.

Course Level: Basic, no pre-requisites

About the Course:

In this course, you will find out what is going on in the healthcare industry. Find out what is really necessary to obtain a fair quote. See what underwriters look at when they set your rates. Learn more about alternate quotes such as High Deductible Health Plan and HSA's. Discover some additional government bills that will impact you and your employees. Get a refresher on other benefits that are being offered. Finally, find out why your broker is the most important person you deal with in regards to your employee benefits package.

About the Speaker and his firm:

Richard Nevins is President and one of the original founders of Chapman Schewe, a national employee benefits brokerage and consulting firm. Richard works with all sized companies in the analysis and recommendation of alternatives to aid companies in reducing their overall health care costs in the areas of medical, dental, life, disability, long term care, 401K, and voluntary products. His objective is to ensure that all employees receive the benefits that they are entitled to receive. Some of his firm's clients include Cooper Industries, Stage Stores, Junior League of Houston, City of Stafford, DE Harvey, and Sirius Solutions.

President's Letter

Being President of AWSCPA Houston Affiliate forces a successful president to use and develop skills that are different from those needed to be a committee chair. It is possible for a committee chair to oversee every detail of her event. We have too many events for the President to oversee all the details of each one. But at Board meetings the President can get reports on what is happening in each committee. Then if nothing is happening in a committee, the President has to make a choice as to what action to take. She can try to help and train a committee chair. She can ask someone else to help and train a new committee chair or take over the committee chair job. She can do the job herself. She can opt to let that event be a non-event. This is where the "big

picture” is important. The President has to decide what course of action will be the most harmful or helpful to our organization overall.

We are a volunteer group. At the National Conference in the Affiliate Exchange we were told never criticize anyone’s efforts. Give praise for any job done no matter how small or incomplete it is. This is not corporate America. We cannot threaten to cut off someone’s paycheck. And a President herself can only give so many hours to the organization. As a leader she has to learn to deal with imperfection and set priorities. Without members we will not be an organization. A successful President has to value her members, work with her members, and delegate if she can without burning her members out. And if she can, find the right person for a job. Most people, if they want to do something, find the time. New member involvement is vital to sustain the organization. Furthermore we have to recruit new members to grow and replace attrition.

The systems we have in place can be a President’s best friend. **Gilda Mendoza**, Vice-President, had warned me the Fall was her busiest time. She did update the previous vendor letter (I proofed it, and there were zero errors), and we did get it in the October newsletter as an insert. But when I called her in January to get an update on the vendors, she said she had not had time to deal with it. But she said vendors had called her wanting tables. After we adjusted for the two tables our title sponsors were to receive as part of their title sponsor package, informed one of the vendors she could not share a table and had to purchase a second table, and added a couple of last minute vendors, we did not have room for any other vendors. The vendors are now a system that happens without much effort. And we have many similar systems in our organization. We also have years of experience trying different ideas. But a President has to listen to take advantage of other members’ experiences. And the other members have to be willing to help a President.

I notice when I talk with little girls, many are so eager to please. Any criticisms seem to shatter them. I think some of us have taken this attitude with us as adults. We are afraid to be less than perfect because we equate being perfect with being loved. But that attitude limits us in leadership roles because a successful leader stays informed but does not micro-manage. A successful leader knows one has to pick one’s battles. Maybe our fear of failure is one of the reasons there are only 14 women out of 100 U.S. Senators or there are few women at the top of corporations. Of course, our history of discrimination is a factor too.

I think the greatest value I have received from AWSCPA is an opportunity to try a leadership role in a safe environment. I had incredible support the first time I was a President in 1997/1998. And in my second term as President, because of the years of experience in AWSCPA, I could see “the big picture” and address areas I did not address in my first term. That is not to say as a second term President I was able to make happen everything I would have liked to have happen.

My hope is that I have been able to put back into place, strengthen, and create systems that will make the road easier for the next Presidents and will also strengthen our organization.

Jane L. Tillinghast, 2005/2006 President

Member News and Announcements

Regional and National News –

In a AWSCPA Affiliate conference call on Thursday, February 9th. New York, S. Florida, Tucson, Los Angeles, Georgia, Oklahoma and Houston Affiliates participated with **Shari P.**

Harris, National Director from the East Coast and **Robin Phaneuf**, National Director from the West Coast. Items discussed:

1. The ASWA National Conference will be held in Las Vegas, Monday, September 18 through Wednesday, September 20, 2006. There is a call out for speakers or topics. The call for speakers and topics has been extended until the end of March.
2. The Membership Drive has been extended through the end of February. Every referring person gets \$10 and all referring persons' names are put into a pot for a \$100 gift certificate. And the members that joined at our annual seminar qualify. I suggested those who woman'ed the membership table be considered the referees. At the telephone conference I was told we just had to call Melissa up and ask her to write our referees' names on those new applications.
3. The TechCast apparently are a success. If it is done via tele-conferencing, several people can join in and get credit for the price. It is interactive. There were positive comments from those on the conference call that had participated. The Auditing (Fraud) one is being repeated in March because it was so popular. Please remember though, our CPE requirements are regulated by the states. The Dress for Success TechCast will not qualify for CPE in Texas. There is a list on the WWW.AWSCPA.ORG of the upcoming presentations. The National officers would like our ideas on what to present in the future.
4. Again there is a call for awards and Scholarships. The deadline for the following is June 30, 2006:

Woman CPA of the Year Award

Educator of the Year Award

Star Affiliate Award

Public Service Award

Woman of Courage Award

We have to get in our application for matching scholarship funds by the end of April.

5. The AWSCPA Virtual Mall is open. Rumor has it there is some good shopping there. Look under Members only on the web site.
6. We have a discount program. And if we partner with certain stores, they will contribute 5% to 8% of our purchase price to our scholarship fund.

We had a general discussion of our respective affiliates. Los Angeles needed some suggestions on member retention and involvement. A survey to find out member needs was recommended. Tucson said they involve new members early on. They give a new member an easy job such as Secretary or Treasurer and then work the person up the ladder if she wants to move. We all agreed it is challenging to maintain memberships with all the demands on everyone's time. But someone brought up the point that Affiliate meetings are a great place to learn to network. It is a great place to practice before going in a room full of men.

Federation of Houston Professional Women –The next quarterly event is January 23, 2006. Please mark your calendars to attend the next Federation quarterly meeting. It is a time to meet other women and see what they are up to. It is a great opportunity to network and make new friends and business acquaintances.

To register for the next meeting to the website www.fhpw.org and fill out the registration form. If you are not familiar with this organization, the website has information to get you more familiar with what it is all about. Going to the meetings will give you even more of a better feel.

See you there!

Board Meeting – A board meeting is scheduled at the end of the March 16th dinner meeting. Board meetings are open to all members.

Looking - Jennifer Broussard has a friend who has been a full charge accountant for a non-profit for years. They are losing their funding and she may lose her job. If anyone knows of an opening for a full charge accountant, please contact Paula Atkins at (713) 409-4100.

2006 Woman of Excellence

The American Woman's Society of Certified Public Accountants has selected Joan Roggenstein Khosla as their 2006 Woman of Excellence. Joan will be honored by the Federation of Houston Professional Women in September during the Federation Gala along with other women chosen by their women's organizations as Women of Excellence. This is a time to recognize women who have contributed to their nominating organization, their business or career and other community activities.

Please plan to attend the Federation Gala in September to support our Woman of Excellence and to help the Federation raise money to provide scholarships to women.

Joan is a CPA and is the co-owner of eXcellence in IS Solutions, Inc. (X-ISS), where she holds the title of Treasurer. Joan helped found this company with her husband in 1993. In the early years of the company, Joan also operated her own consulting service where she specialized in financial reporting and accounting system upgrades. Joan has held the positions of President and Secretary, along with numerous committee chairs, for AWSCPA during her 14 year membership. She has chaired or been on the committee for the AWSCPA annual seminar during the last 10 years. Joan is also actively involved with her children's school PTO and served as an officer or committee chair for the last four years. She is also actively involved in several organizations in her neighborhood. Joan is married to Deepak and has two boys, Quinn 8 and Griffin 6.

Congratulations Joan!

THE CALL COMMITTEE

- **Uzma Chowdhury** - (281) 447-8787 anmeer@yahoo.com - Anderson through Cooper
- **Brenda Banks** - Courtright through Hintzman
- **Stephanie Sawyer** - (281) 367-8434 ssawyer@sbcglobal.net - Hochstetler through Martin-Worthington
- **Jolly Mathew** - (713) 660-7862 kallour@aol.com - Mathew through Pels
- **Cheryl Sanders** - (713) 544-5438 cheryl.sanders@gulfsouthpl.com - Petty-McKinney through Staples
- **Annette Williamson** - (713) 501-0039 netwilliamson@sbcglobal.net 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.

AWSCPA Civic Project Basket

We will be setting up a donation basket at each meeting for our members to drop off items for the following organizations:

The Women's Home (items for their thrift shop – anything welcome!)

Dress For Success (women's professional clothing and accessories)

The Council on Alcohol and Drugs (men's toiletries, socks, backpacks, etc..)

Cash donations would also be welcome. Simply indicate the organization on the items if you have a preference for your donation.

**Houston Affiliate
Fiscal Year 2005 to 2006
Officers and Committee
Chairs**

**AFFILIATE
OFFICERS**

Position	Name	E-Mail	Work or Cell	Home
President	Jane Tillinghast*	jtillinghastcpa@aol.com	(713) 681-7558	(713) 688-3531
Vice-President	M. Gilda Mendoza*	gmendoza@kanaly.com	(713) 582-0586	(713) 926-3389
Secretary	Ellen McMurrey*	emcmurrey@nwebs.com		(281) 489-1822
Treasurer	Cynthia Cox*	ccox@cynthiacoxcpa.com	(281) 331-8185	(281) 756-8335

**Committees and
Other Positions**

Position	Name	E-Mail	Work or Cell	Home
Annual Seminar	Jane Tillinghast	jtillinghastcpa@aol.com	(713) 681-7558	(713) 688-3531
	Kathryn Harriss	kharriss2@yahoo.com	(713) 320-8388	(713) 681-2669
	Joan Khosla*	joan@khoslas.com	(713)717-5368	(713)681-6209
	Susan Taylor*	staylora@sbcglobal.net	(281) 233-1354	(713) 781-7649
	M. Gilda Mendoza	gmendoza@kanaly.com	(713)582-0586	(713)926-3389
Arrangements	Barbara Courtright*	barbcourtright@houston.rr.com		(713) 991-2355
Charter Renewal	M. Gilda Mendoza	gmendoza@kanaly.com	(713) 582-0586	(713) 926-3389
Civic Project	Joan Khosla	jkhosla@x-iss.com	(713) 717-5368	(713) 681-6209
Scholarship and Education Outreach	Varsha Shah	vshah@westlakegroup.com	(713) 585-2647	(713) 465-1102
Ex-Officio	Anna Marie La Porte*	jalprt@sbcglobal.net	(281) 433-3618	(713) 694-8042
Fall Mini-Seminar	Brenda Banks	bftbanks@aol.com	(281) 374-5328	(281) 812-2413
Federation Delegates	Rhonda Ryan	rhonda@rhondaryan.com	(713) 686-2697	(713) 686-2697
	Nancy Nguyen	nancy.nguyen@ubs.com	(713) 985-3438	(713) 662-9850
Historians	Anne-Marie Suire	asuire@netzero.net	(281) 433-3618	(281) 261-0843
	Sue Bailey	suebailey_nl@yahoo.com	(713) 247-2466	(713) 520-1903
IRS Delegate	Lisa Cropper	lcropper@sbcglobal.net	(281) 996-8017	
Job Bank	Rhonda Ryan	rhonda@rhondaryan.com	(713) 686-2697	(713) 686-2697
Membership	Anna Marie La Porte	jalprt@sbcglobal.net	(281) 433-3618	(713) 694-8042
Database & Labels	Kathryn Harriss	kharriss2@yahoo.com	(713) 320-8388	(713) 681-2669
New CPA Reception	by committee	jtillinghastcpa@aol.com	(713) 681-7558	(713) 688-3531

Newsletter Editor	Susan Taylor	staylora@sbcglobal.net	(281) 233-1354	(713) 781-7649
Programs/Speakers	Donna J. Mikulecky	donna.mikulecky@christushealth.org	(713) 812-6882	(713) 664-1727
Publicity	Wanda Llorens*	wellor@earthlink.net	(713) 952-5102	(713) 952-5102
Scholarship	Varsha Shah	varsha_saraiya@hotmail.com	(713) 585-2647	(713) 465-1102
Spring Mini-Seminar	Phyllis Martin	pmartin@finsvcs.com	(713) 402-3850	(713) 780-9006

*** Board Members**

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.

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

c/o Anna Marie LaPorte
811 Pinemont Dr.
Houston, TX 77018

ADDRESS CORRECTION REQUESTED

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Meeting Date: Thursday, March 16, 2006

Location: Sheraton Brookhollow

UPCOMING MEETING CALENDAR

<i>Date</i>	<i>Speaker - Topic</i>
March 16, 2006	Insurance Alphabet Soup – Good for Your Health – Richard Nevins, CPA
April 20, 2006	Alternatives to Sec 529 Plans – Philip B. Moran, MBA, ChFC, CFP
May 18, 2006	Women in Investing – Wm. Fields Leake, CFBS and Ann Laufman, LUTCF

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, March 10, 2006