
41ST ENTRY

American Society of Women Accountants Milwaukee Chapter #41

Volume 52, Issue 2

September 2003

President's Message

Labor Day is behind us, the kids have all gone back to school, and it's starting to smell like Fall in the air. This is one of my favorite times of the year. For many of you, this also means the start of the busiest time of the year in your work life. For many of us it's year-end close, or for our colleagues in public accounting, time to ramp up for tax season.

In all the rush with family and work, don't forget to leave time for yourself. Take part in a personal activity that is relaxing and fun, whether it's lunch with an old friend, a day at the spa, or just a quiet hour with a good book.

Let's also not forget those of us who need a helping hand. Fall is also a great time to clean out clutter and items you know longer need. Robert Half and Accountemps are having a suit drive for the Bottomless Closet from September 15th through September 26th. If you are not familiar with the Bottomless Closet, it is for women returning to the workforce who need appropriate business attire, and don't have the financial resources or expertise. The right clothes many times can be the difference between getting and not getting a good job. Give Lisa Wright at Accountemps a call at 271-8367 to arrange to have your items picked up.

I hope to see many of you at Student Activities Night and throughout the rest of the year.

Susan Hallberg

Succession Planning

An essential part of any career move is preparing a successor who can assume your responsibilities once you complete your transition. In a recent Robert Half International survey, 100 percent of executives said selecting and training a successor is valuable, and a majority, 72 percent, said they're currently preparing their replacement.

Identifying and grooming a successor as far as possible before your career transition will help you avoid last-minute efforts to ensure that the individual can contribute effectively to the company's success. He or she can fill in for you while you're out of the office or relieve you of some of the lower-priority, day-to-day responsibilities. This not only allows you to focus on bigger-picture initiatives but also gives the professional valuable hands-on practice carrying out some of your job duties.

Below are a few guidelines to keep in mind when grooming your successor:

- **Identify the right person.** The best choice won't necessarily be the next highest-ranking employee or your top accountant. Look for someone with strong accounting experience and who is, or has the potential to be, an excellent leader and communicator.

Continued on page 2

INSIDE THIS ISSUE

2	Scholarship Up To Date/Succession Planning
3	Sources and Resources / Gaining the Competitive Edge
456	Student Night Invitation, Bios
7	ASWA Networking Event/Employment Opps
8	Meeting Schedule

Scholarship Up To Date

Scholarship applications were sent out to our local and neighboring colleges on September 9th. The applicant has to be in her JUNIOR year and majoring in accounting. Students can get their application at the financial aid office of their school, at our Student Night, or they can email me or send me a note requesting one. We have one \$1,000.00 scholarship to be awarded for the 2004-2005 school year. Applications need to be returned to me by November 19th.

The Scholarship Committee

Golden Wisdom

Make a friend of Time; don't abuse it or waste it.

Never ignore it or take advantage of it.

Don't try to outrun it or evade it.

Plan for it's use, and respect it as the precious resource it is.

With Time on your side, the passing years will be welcome.

Your chosen replacement should also indicate an intention to stay with your company for the long term and have the skills necessary to meet changing business demands.

- **Start the process.** Once you've made your selection, let the person know right away. This will confirm that you value the individual's contributions and will motivate him or her to keep up the outstanding work. Include your successor in strategy-setting activities and encourage input. Look for supervisory opportunities for your colleague, such as overseeing a cross-departmental initiative.
- **Move forward.** Provide the prospect with feedback on a regular basis, including during formal review and one-on-one counseling sessions. Work together to set measurable goals appropriate to the person's experience and abilities. Continually push your successor to improve and grow in the new role by offering new projects and challenges with increased responsibilities.

Accountemps is the world's first and largest temporary staffing service specializing in the placement of accounting, finance and bookkeeping professionals. The company has more than 320 offices throughout North America, Europe, Australia and New Zealand, and offers online job-search services at www.accountemps.com. For more information, call the Milwaukee office at (414) 271-8367.

Employment Opportunity

The Wisconsin Department of Revenue currently has an opportunity available for the Section Chief of our Field Compliance Section in the Division of Income, sales and Excise Tax. The announcement and application instructions can be found at our Internet site at:

<http://www.dor.state.wi.us/hrs/0301296.html>

The deadline for this position is Sept. 24, 2003. Questions about this position may be directed to Dianne Donlin at (608) 266-2679.

SOURCES AND RESOURCES

ASWA's Mission: *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.*

President:

Susan Hallberg, CPA
Aids Resource Center of WI, Inc.
820 N. Plankinton Avenue
Milwaukee, WI 53202
414-225-1542, shallberg@wi.rr.com

Vice President/Program:

Cheryl Pfundtner, CPA
Quarles & Brady, LLP
411 E. Wisconsin Avenue
Milwaukee, WI 53202-4497
414-277-5185
cp2@quarles.com

Joan Cook, CPA
MATC
700 West State Street
Milwaukee, WI 53233
414-297-6438
cookj@matc.edu

Membership:

Janet Sargent
Cedarburg Pharmaceuticals
8805 Bridge Street
Cedarburg, WI 53012
262-376-1068
jsargent@wi.rr.com

Newsletter Chair:

Marsha Ditter
Hoffman York, Inc.
1000 N. Water Street, Ste. 1600
Milwaukee, WI 53202
414-225-9533
mditter@hyc.com

National Headquarters:

1595 Spring Hill Road, Suite 330
Vienna, VA 22182
800-326-2163
703-506-3266 fax
aswa@aswa.org; www.aswa.org

10 Key Ways for Gaining the Competitive Edge in Today's Workplace

- Use a form of thanks in the first 12 words you speak.
- Make sure you have professional presence when dressing business casual.
- Know how to introduce two people whose names you've forgotten.
- Get on others' neurolinguistic wavelengths.
- Put your best self forward on e-mail.
- Know when to send a thank you via US mail vs. e-mail.
- Send a thank you anytime it takes someone more than 15 minutes to do something for you.
- Send a follow-up letter when you don't land that job.
- Know how to work a room of strangers.
- Recognize the differences between dining and eating during business functions.

From a very useful and practical session on business etiquette presented by Ann Marie Sabath, founder of At Ease, Inc.

To learn more about business protocol and etiquette, visit her Website at www.corporateetiquette.com.

Knowledge is not power, it is only potential power that becomes real through use.

Dorothy Riley, African American Wisdom (1999)



Student Night

Tuesday, September 30, 2003

Klemmer's Banquet Center

10401 West Oklahoma Avenue, West Allis

CAREER PATHS FOR ACCOUNTANTS

BARBARA ECKLOND, CPA – PUBLIC ACCOUNTING OPPORTUNITIES
VIVIAN MOLLER, CPA – ROLES IN INDUSTRY
SUSAN HALLBERG, CPA – NONPROFIT AS A CHOICE

AND

THE NEW FORMAT FOR THE CPA EXAM

Raffle for many prizes including 1 grand prize for a scholarship to the Becker CPA Review

Networking 6:00p.m.

Dinner at 6:30p.m.

Program at 7:30p.m.

Please call Sue Heaton for more details at (262) 923-5160 (heatons@sva.com)

Or Cheryl Pfundtner (414) 277-5185 (cp2@quarles.com)

RSVP BY 9/22/2003

Return this portion with a check Please make copies of this form as needed

(Members \$19, Students \$16 Guests \$21)

To Cheryl Pfundtner, CPA
Quarles & Brady LLP
411 E. Wisconsin Avenue
Milwaukee, WI 53202-4497

Please Make Checks Payable to American Society of Women Accountants

Name:

Address:

School:

Phone number:

Email address:

ASWA STUDENT NIGHT

Date: September 5, 2003
To: Business Schools, Accounting Organizations, Professional Contacts
From: Sue Heaton, CPA
Subject: STUDENT NIGHT – AMERICAN SOCIETY OF WOMEN ACCOUNTANTS

Enclosed please find invitations to our annual Student Activities Night. We would appreciate it if you would announce, distribute, post and copy as needed to students, co-workers, interested accounting professionals or any other individual who might be interested in attending this dynamic networking and informative night.

We have a wonderful program planned to give students an opportunity to hear from accounting professionals in public, corporate and non-profit roles as to why they feel their particular choice of accounting career was the best.

We will also explore the new format for the uniform CPA Exam and are fortunate to have a member of the national task force for pre-testing speak to the students. Ann Dee Allen is from our own WICPA, and was the only non-academic member of that committee, representing all state CPA societies.

Please contact Sue Heaton, CPA (Suby, Von Haden & Assoc.) or Cheryl Pfundtner, CPA (Quarles & Brady LLP) for more information, as disclosed on the invitation.

This is always a fun and informative night for all attendees. We encourage accounting professors and advisors to attend.

SPEAKER BIO FOR STUDENT NIGHT

Barbara G. Ecklund, CPA



“Planning is the basic tool necessary for running a successful business. If planning is overlooked as an ongoing tool, your business falls prey to reactionary problem solving which consumes valuable management time. Planning must be a continuous process whether long-term or short-term in nature. An active business plan will help you maintain control of your business and will assist you in attaining your goals.”

Experience

Barb is a Principal at Suby, Von Haden & Associates, S.C. and a member of the Business and Management Consultants Division. She provides clients with both the accounting and financial services needed to run a smooth operation, as well as the consulting guidance which helps clients manage their operations more effectively. Barb assists clients with setting long- and short-term goals, budgeting, assistance with bank financing, cash flow management, risk management, personnel management, and ownership succession planning.

Barb also works closely with business owners in managing financial reporting requirements, including financial statements, reviews and audit requirements, and business and individual tax planning. She focuses on minimizing taxes and maximizing the financial well-being of individuals, as well as designing retirement plans and developing estate plans.

Education

Barb received her Bachelor of Science in Business, majoring in Accounting and Finance, from Miami University in 1988. She received her Certified Public Accountant credential in 1989.

Professional Affiliations

Barb is a member of both the Wisconsin Institute of Certified Public Accountants and the American Institute of Certified Public Accountants.

VIVIAN MOLLER, CPA

Vivian Moller is the Vice-President and Controller of Hoffman York, a full-service advertising agency in downtown Milwaukee. She has been employed there since 1995 when she started as Accounting Manager. Vivian graduated from the University of South Dakota in Vermillion in 1994 with a B.S in Business Administration with an emphasis in Accounting. She received her CPA certification in 1996 and is a member of the AICPA and the WICPA where she currently serves on the Accounting Education Committee. She's been a member of the American Society of Women Accountants since 1994 and has held the positions of Treasurer, PR Director, & President. Prior to her life in accounting, Vivian worked in broadcast journalism for 17 years.

ASWA NETWORKING EVENT

Thursday, October 30, 2003

The ASWA Networking Event is scheduled for October 30th, 2003 at the Wisconsin Club. Our keynote speaker is Senator Roberta Darling.

If you have any co-workers, friends, or family members that you would like to have an invitation mailed to, please send the name and address to Vivian Moller vmoller@hyc.com by the end of September.

EMPLOYMENT OPPORTUNITIES

The Wisconsin Department of Revenue currently has the following three employment opportunities available:

Deputy Division Administrator - Madison-Income, Sales and Excise Tax Division
Revenue Field Auditor 5 - Milwaukee and Glen Ellyn, IL-Income, Sales and Excise Tax Division
Tax Resolution Officer-Field Audit - Milwaukee-Office of General Counsel

The individual position announcements and application instructions can be found on our Internet site at: <http://www.dor.state.wi.us/hrs/opportun.html>

If you quit while you're ahead, begin again before you fall behind.

AMERICAN SOCIETY OF WOMEN ACCOUNTANTS * MILWAUKEE CHAPTER 41**

Meeting Schedule for the 2003-2004 Year

Location: Klemmer's Banquet Center, 10401 W. Oklahoma Avenue
Time: Social 5:30, Dinner 6:00, Program 7:00
Fees: Members \$19, Retired Members \$16, Students \$16, Guests \$21

Date	Day	Entrée	Program Topic/ Speaker
			Student Night
			<i>Speakers:</i> Barbara Ecklund, CPA Vivian Moller, CPA Susan Hallberg, CPA
Sept 30, 2003	Tuesday	Family Style	
			Networking Event
Oct. 30, 2003	Thursday	TBD-Wisconsin Club	<i>Speaker-Senator Roberta Darling</i>

Please call Joan Cook at 414-297-6438 or send e-mail to her by the previous Thursday to make a reservation or to add/delete your name from the permanent reservation list. Please advise if you wish the alternate Vegetarian Steamed Vegetable Entrée instead. Guests are always welcome at our meetings!

PERMANENT RESERVATION LIST: (Call in ONLY if you wish to cancel!)

Lois Arsand	Sue Heaton	Mary Pulizos
Trudy Daline	Sherri Lederer	Sheila Robak
Eve Bischoff	Bev Loofboro	Janet Sargent
Carol Butula	Darlene Mielke	Ellenmay Seaman
Sue Christensen	Vivian Moller	Valerie Sheldon
Deb Fineour	Ann Neshek	Linda Steinberg
Wendi Hall	Cheryl Pfundtner	Catherine Yekenevicz
Susan Hallberg	Sue Press	

PER EXECUTIVE BOARD RESOLUTION, any member who makes a reservation by the deadline, or any member on the permanent reservation list that fails to cancel their reservation by the deadline, will be billed for their meal.

**American Society of Women Accountants
Chapter 41**

Meeting Dates 2003-2004

Tuesday, September 20, 2003 Student Night
Thursday, October 30, 2002 – Networking Event
Tuesday, November 18, 2003
December-No Regular Meeting/Volunteer Gift Wrapping
(Date to be Announced)
Tuesday, January 27, 2004
Tuesday, February 24, 2004
Tuesday, March 23, 2004
Tuesday, April 27, 2004
Tuesday, May 25, 2004
Tuesday, June 22, 2004 Installation of Officers

American Society of Women Accountants
c/o Marsha Ditter
1000 N. Water Street, Ste 1600
Milwaukee, WI 53202

Place
US
Postage
Stamp
Here

ADDRESS CORRECTION REQUESTED

