



Accounting & Financial Women's Alliance

CONNECT • ADVANCE • LEAD

Orange County Chapter

The mission of AFWA is 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.

AFWA Dinner Meeting January 21, 2015

Wednesday, January 21, 2015 6:00pm
Holiday Inn
2726 S. Grand Avenue
Santa Ana, CA 92705

Affordable Health Care Act

Are you comfortable with your current healthcare? Have you tried to see a doctor lately? Was the experience what you expected?



Come hear our guest speaker Ms. Inhee Carter educate us on changes that will affect you and /or your small business clients.

- Readiness - Budget Considerations
- o New Small Group Insurance Rating Structure
- o Small Employer Health Care Tax Credit

In This Issue

[Networking Mixer Recap](#)
[President's Message](#)
[Student Night and Awards Dinner](#)
[Opportunity Drawing](#)
[Membership Corner](#)

Upcoming Events

1/21/2015 6:00pm
Dinner Meeting
Holiday Inn
Santa Ana

February date TBD
CSUF Mock Interviews

3/19/2015 5:30pm
Speed Networking
TBD

March Date TBD
Mega Mixer
Irvine Area

April date TBD
After Tax Fun
TBD

05/21/2015 5:30pm
Networking Mixer
TBD

6/24/2015 6pm
Installation Dinner
Holiday Inn
Santa Ana

[Visit our chapter website for more details](#)

Board of Directors

President
Millie Culpepper

President-Elect
Karen McGarrigle

V.P. Membership
Lily Gidcumb

V.P. Special Events
Doris Cerna

V.P. Communications
Karen McGarrigle

- Readiness - Plan Administration
- o 60-day Waiting Period Maximum
 - o Spouse-Only (2-person) groups
 - o Owner Only Groups
 - o Flexible Spending Account (FSA)
 - o Participation Requirements - Individual & Family Plan (IFP)
 - o Full-Time Employee Definition
 - o Group Size Determination
 - o The Large Employer Mandate (it's still coming!)
 - o Controlled Group / Common Ownership & Group Size

You can earn 1 CPE credit for attending this event.
Cost: Member \$38, Non-Member \$43, Student \$30
Includes: Entrée, Soft Drink & Dessert

RSVP by Friday, 01/16/2015 to Kristina Diaz reservations@afwaoc.org or [Register here](#)

Recording Secretary
Alison Aldrich

Treasurer
Sandra Maldonado

Directors

Gina Webber
Kristina Diaz

President's Message



For many of us this is a time to reflect on what we've accomplished throughout the year, and to define our goals, both personal and professional, for the year to come. As I look back over the past year, the lesson that stands out most vividly in my mind is the importance of teamwork and collaboration in helping our organization thrive. As President, the collective wisdom and experience of my Board and other long-term members has been invaluable in helping to chart our course. Whether focused on attracting new members, finding compelling speakers to educate and inspire, awarding scholarships to support the education and development of our next generation of accounting and financial professionals, or simply planning a holiday celebration, I am deeply thankful for the passion, creativity and dedication of our chapter members in helping us to define and achieve the goals we hold most dear.

I want to reach out and thank you for being a part of the AFWA family, and best wishes for a prosperous and fulfilling New Year!

If you have not done so, please take a minute to join our chapter on [LinkedIn](#), like us on [Facebook](#) and meet others on [MeetUp](#)!

Millie Culpepper

President



Student Scholarship Awards Dinner Recap

November 19, 2014



Thank you to all of the AFWA-OC Team Members who helped make our annual event a GREAT SUCCESS! A Special Thanks to our guest speaker: Talia Hart, President of the Irvine Chamber of Commerce for her inspirational presentation!

The event was held on November 19th at the Holiday Inn Orange County Airport in Santa Ana, CA. This year, we were fortunate enough to have several major sponsors: Haskell & White LLP, Ledgent, Robert Half International & Dave and Penny Kinnear, dbk Associates, Inc., which resulted in allowing AFWA-OC to award student scholarships to four hard-working students!

* Amy Smith, a 5th year senior at California State University, Long Beach was awarded the \$1,500 AFWA scholarship that was available to any full-time student enrolled in a 4-year college or university in the Fall 2014 semester/quarter with a major or emphasis in accounting.

* Vivian Le, a junior at California State University Fullerton was awarded a \$500 scholarship that was available to any full-time student enrolled in a 4-year college or university in the Fall 2014 semester/quarter with a major or emphasis in accounting.

* An Luc, a sophomore at Cypress Community College was awarded a \$500 scholarship that was available to any part-time or community college student enrolled in the Fall 2014 semester/quarter with a major or emphasis in accounting that has completed at least 12 units in business administration classes.

* Kayley Nhu Vu, a sophomore at Cypress Community College was awarded also a \$500 scholarship that was available to any part-time or community college student enrolled in the Fall 2014 semester/quarter with a major or emphasis in accounting that has completed at least 12 units in business administration classes.

Other participating sponsors were: Disneyland Resort, Roger CPA Review,

Becker's CPA Exam Review, The Holiday Inn-Santa Ana, Roth Staffing Companies, L.P., Ann Marie Broderick, CPA & Millie Culpepper, President, AFWA OC Chapter. Thank you!!

We look forward to staying in touch with these bright students while leading the way in the Finance & Accounting profession!





Recap Holiday Event December 6th Citrus Cafe in Tustin.



Our holiday breakfast was quite a success. We had a wonderful morning with the group of ladies talking about our plans for the up and coming year. This was the first year we tried a Saturday breakfast and everyone seemed to love it.!



Free CPE offered by Ledgent!

Gina Webber

Each session is worth 3 Interactive CPE Credit hours. They are held the second Tuesday of the month at our Tax & Financial Group partners in Newport Beach. Our next CPE session is being held Tuesday, 1/13/2015 at

The Tax & Financial Group

4001 MacArthur Blvd #300

Newport Beach, CA 92660

8:00 a.m. to 10:00 a.m. We will provide a light breakfast.

Accounting & Auditing Report

- * Recent EITF Issues
- * Reporting Issues Associated with PCC Alternatives
- * Small Business – QuickBooks, Best Practices

FREE CPE worth 3 interactive CPE hours. Please RSVP at your earliest convenience by calling Gina Webber at 714.929.1320 or emailing her at gwebber@ledgent.com

AFWA Chapter dues increases on July 1, 2015

Millie Culpepper

As most of you are aware, AFWA's annual dues are comprised of both a national and a local chapter component. Last year, our National dues increased by a modest \$5, while our local chapter dues did not increase at all. Currently, AFWA's National dues are \$131 and our local Orange County chapter dues are \$56. An additional one-time application fee of \$25 is also required for new members.

In order to keep pace with our ever increasing costs, and in accordance with our bylaws, this notice is to inform you that the Board has authorized an increase in local chapter dues beginning in July 2015. Dues for **Retired** members in the 2015-2016 fiscal years will increase by \$1, from \$5 to \$6. Regular, Affiliate and Student membership classifications will be exempt from this increase. Retired renewals membership received on or after July 1, 2015 will be processed according to the 2015-2016 dues structure.

We value your ongoing participation in the local Orange County AFWA chapter, and welcome your feedback. If you have any questions or comments about this change, please feel free to reach out to me directly, or to any member of this year's Board of Directors.

Membership Corner

Lily Gidcumb

Please join me in welcoming 3 New Student Members: Alison Ernst, Vy Le and Zohra Cronin.

It has been a great year. I want to thank, past, current and future members, guests, and speakers for your support, your participation and enthusiasm to our chapter. I believe our chapter is heading in the right direction to increase membership, improve online access and communication, and expand awareness of our chapter in our communities, as well as in the accounting and financial industry.

It has been a great honor to serve as your VP of Membership this year and work with this Chapter Board, especially with a group of wonderful, intelligent, and supportive women who have contributed their time and efforts to support our members.

As we move forward into 2015 and continue to strengthen and grow our organization, your support always means so much to us. Our mission is 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. We cannot achieve our mission without you.

I wish you and yours a Happy New Year - See you in 2015!

To learn more about joining our organization, [click here](#)

Come be a part of the AFWA Board of Directors

Millie Culpepper

Becoming involved in chapter activities is the best way to take full advantage of your AFWA membership. We offer many opportunities for networking, learning, mentoring being mentored, and for leadership positions, all of which will help you in your accounting career. AFWA's Orange County Chapter is looking to fill board and various committee positions for the coming year.

Getting involved is a great way to make the most of your AFWA membership! The benefits of volunteering include:

- Developing strong professional relationships with other members and chapter leadership
- Parliamentary Procedure using Robert's Rules of Order
- Exploring new areas, technologies, and tools
- Honing presentation, public speaking, and writing skills
- Gaining management and leadership skills
- Contributing to events and initiatives that will benefit all AFWA members
- And much more!

There are three ways to get involved. Choose one, or all!

- **Committees:** If you'd like to be involved in long-term projects and help guide the direction of our chapter, check out descriptions on our website [committees](#).
- **One-time events:** If you'd like to help out with fun events such as Student Night, the Scholarship selection process, or dinner meetings.
- **Donate:** If you're short on time, but would still like to make a contribution, donate to the AFWA Scholarship Fund through our [secure donation](#).

I am chairing the chapter's nominating committee this year. I would be glad to answer any questions you have about board service if you are interested in pursuing a greater leadership role in AFWA. I can say that it has been the best leadership experience and strongly recommend it to anyone who has a passion for our great organization. If considering a board position, please request and complete a bio form. I look forward to hearing from you!

Bio Form, please contact Millie Culpepper via email at president@afwaoc.org or call 714 402-5535.

**Accounting & Financial Women's Alliance Chapter #73
949-862-0777**