



## Accounting & Financial Women's Alliance

CONNECT • ADVANCE • LEAD

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.

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### Upcoming Events

06/19/2013  
Dinner Meeting  
6 pm  
Doubletree Hotel

07/13/2013  
Annual Planning  
9am - 3pm  
Ledgent

08/21/2013  
Dinner Meeting  
6 pm TBD

10/8/2013  
Annual NAWBO-OC  
5pm  
Anaheim Grove

10/20-23/2013  
AFWA Conference  
Hyatt Indianapolis

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

### Board of Directors

President  
Millie Culpepper

President-Elect  
Open

V.P. Membership  
Kristina Diaz

V.P. Special Events  
Gina Webber

V.P. Communications  
Karen Espinoza  
McGarrigle

## President's Message

Millie Culpepper



Join us **Wednesday, June 19<sup>th</sup>, 2013** for a very special installation, Accounting & Financial Women's Alliance rebranding launch celebration! Announce the election results of our 2012/2013 Member of the Year; thank our 2012/2013 Officers and Directors and install our new 2013/2014 Officers and Directors.

We are very excited to have past President and 27 years member Dolores Lara performing this year's installation. Dolores is an outstanding professional and strongly supports the Orange Chapter of AFWA and we are so pleased that she has agreed to perform this year's installation.

I am grateful to AFWA and must give a heartfelt thank you to my 2012/2013 Board members:

VP Membership / Treasurer: Alison Aldrich

VP Special Events: Kristina Diaz

VP Communications: Diane Randall

Recording Secretary / Director: Lynn Parker

Past President / Director: Irene Mack, CPA

Directors / Newsletter: Gail Campbell

I also acknowledge and appreciate the committee chairs: Inhee Carter, Dolores Lara, Adriana Estrada, Marcy Beck, Sharon Bujacich and Lorraine Shoun.

This year highlights:

- The ASWA Angels walked or slept in for the cure at the **2012 Susan G. Komen Race**
- We networked nationwide, proudly representing the chapter at **National Annual Conference** in San Diego, CA
  - Annual Business Meeting - Voted for the change name to **Accounting & Financial Women's Alliance**
  - Nationally voted our chapter having the best **2012 Website** ([www.afwaoc.org](http://www.afwaoc.org))

- We honored our **Scholarship Award** winners during this year's annual **Student Night** festivities
- Celebrated with friends and family at an elegant **Holiday Dinner Celebration**
- In **April after Tax Season** we joined with members and friends **Spring Tea Event**
- Offered up a wide variety of **dinner meetings/CPE**, or **networking mixers** monthly
- We completed the rebranding ahead of schedule!

It takes the combined energy and talent of everyone in our chapter to make these events happen. Thank You to all volunteers, your contributions, both great and small, for generosity, giving of yourselves to make AFWA the great organization that it is.

In looking to the future, I am honored to continue to serve as your president for the 2013/2014 year. On Saturday, July 13<sup>th</sup>, we will hold our annual planning and transitional meeting. This is an informal meeting for setting goals, planning programs, discussing the website and establishing budgets for the coming year. We encourage all members to participation and value your recommendations.



Please join our LinkedIn group

Connect and network online with other professionals, start discussions and more!  
[Click here to view our group profile.](#)

For additional AFWA networking click links below:

[AFWA Orange County Chapter's Website](#)

- National [Website](#)
- National [Facebook](#)
- National [Twitter](#)
- National [Blog](#)

Recording Secretary  
Open

Treasurer  
Alison Aldrich, MBA

**Directors**

Director  
Jessica Clarke

Director  
Doris Cerna

Director  
Cindy Taylor



**June Dinner Meeting**

**The Crucial First 100 Days of New Leader & Beyond**  
**Guest speaker Scott Hamilton, President & CEO, Executive, Next Practices Institute, Managing Director, NextWorks**

Wednesday, June 19, 2013  
 6:00pm to 8:30pm  
 Registration at 5:30pm  
 Doubletree Hotel  
 201 East MacArthur Blvd  
 Santa Ana, CA 92707

Salad: Mixed Green Salad with Pomegranate Dressing  
 Main Dish: Sautéed Salmon in a Lemon Buerre Blanc Sauce  
 Side Dish: Rice Pilaf and Seasonal Vegetables  
 Dessert: New York Cheesecake

Three convenient ways to register:

Online: [Via PayPal](#)

Email: Contact [reservations@afwaoc.org](mailto:reservations@afwaoc.org)

Phone: AFWA voice mail at 949-862-0777

Pre-registration Price by noon Monday June 17, 2013:

Members: \$41 / Non-Members: \$51 / Student Members: \$30 / Student Guests: \$35

Late or No Registration Price:

Members: \$46 / Non-Members: \$56 / Student Members: \$35 / Student Guests: \$40



**Scott Hamilton**

President & CEO, Executive Next Practices Institute,  
Managing Director, NextWorks™

Scott Hamilton is a globally noted business leader in the area of executive and organizational performance from entrepreneurial ventures to the *Fortune Global 1000*.

Hamilton is the co-founder of NextWorks™; a unique advisory and research team that assists leaders turn their vision into unified, positive action. His globally based programs help executive teams build their internal organizational capability to innovate, execute and produce extraordinary results. His client programs have included large-scale change efforts, organization design, team building, merger and acquisition/integration teams, internal brand building, customer alignment and in-house executive development programs.

## Attention Members! Annual Planning Meeting

### Millie Culpepper

Want to get involved? Develop your leadership skills?  
And work with a group of outstanding women?  
We would love to have you at our annual planning meeting in July.  
Here are the details:

Date: **Saturday, July 13th, 2013**  
Time: **9am - 3pm**  
Location: Gina Webber's office  
**Ledgent**  
949 S. Coast Drive, Suite 150  
Costa Mesa, CA 92626  
714 929-1320

Welcome to the 2013-2014 AFWA chapter board and committees. We're looking forward to having another great year together!

What to bring if you have a position as an officer, board member or chair:

- A blazer for pictures
- Your enthusiasm & leadership knowledge
- Your job descriptions and a clear understanding of them
- An open mind and new ideas
- A goal that you want to accomplish in your positions next year and a list of 3 to 5 critical success factors that will need to happen in order to accomplish your goal.

Please remember to meet with your predecessors before this meeting. It is crucial that you understand your new position and how you can succeed on the 2013-2014 AFWA Orange County Board of Directors!

Lunch will be provided from Cosi - Please see menu options below and RSVP to Millie Culpepper at [aswa.culpepper@aol.com](mailto:aswa.culpepper@aol.com) with your lunch choice by July 12<sup>th</sup>, noon.

Select one of the menu options:

#### **Sandwiches:**

- Turkey Light - shredded romaine, spicy honey mustard (391 cal)
- Hummus & Veggies - tomatoes, cucumbers, red onions, basil (397 cal)
- Tandoori Chicken - blended with Eastern spices, red peppers, vinaigrette (533 cal)
- Cosi Club - roasted turkey, bacon, tomatoes, shredded romaine, low-fat mayo (455 cal)

**Salad:** Chicken Caesar (608 cal), Shanghai Chicken (316 cal) or Greek Salad (516 cal)

## AFWA Tea Time Held April 20, 2013

### Special Edition

Alison Aldrich

We had a wonderful time at our "after tax" fun event on April 20<sup>th</sup>. We had quite a few Past Presidents in attendance: Irene Mack, Jennifer Cavendar, Maria Beechan, and Lynn Parker. Our current and future President, Millie was also in attendance and she donated a divine gift basket for the opportunity drawing. Members Donna Bernbrock, Lorraine Shoun, and Doris Cerna all enjoyed the tea organized by Kristina Diaz-thanks, Kristina! Guest and former member Lisa Bolen donated a lovely gift basket for the opportunity drawing. Former member Kathy Laurel (Jow) and hopefully future member Mary DiLucca rounded out our party.

Please join me in welcoming our newest member, Gerlinde Sunbury. Gerlinde was able to join us at the April tea, so several of us got to meet her, as well new to our chapter Jessica Clarke transferred from Hawaii chapter was also able to attend. Glad you both could join us!



## AFWA Orange County's 2013 - 2014 Board of Directors

We are pleased to announce that the following slate of officers and directors was unanimously elected by the members in attendance at the Orange County Chapter of the Accounting & Financial Women's Alliance May 15th dinner meeting. Please join us for the formal installation of our new Board during our upcoming dinner meeting on June 19th. Very special thanks to Irene Mack, Alison Aldrich and Millie Culpepper nominating committee members.

Congratulations to all of our nominees, and thank you for volunteering to guide our chapter in the coming year! If you are interested in any of the open Board positions, please reach out to any one of the nominating committee members for further information.

**President: Millie Culpepper**  
**Treasurer: Alison Aldrich**

**President-Elect: Open**  
**VP - Membership: Kristina Diaz**  
**2<sup>nd</sup> VP - Communications: Karen Espinoza McGarrigle**  
**3<sup>rd</sup> VP - Special Events: Gina Webber**  
**Recording Secretary: Open**  
**Director: Jessica Clarke**  
**Director: Doris Cerna**  
**Director: Cindy Taylor**

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## AFWA National News



Accounting & Financial Women's Alliance  
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### Message from Cheryl Heitz, 2012-13 AFWA National President

Dear Member,

On behalf of the Accounting & Financial Women's Alliance (formerly American Society of Women's Accountants) National Board of Directors, we thank you for your continued support of your professional association. We are privileged to count you among the 3,500 members of the Accounting & Financial Women's Alliance, all of whom we are dedicated to serving. Your participation is vital to the future of the organization, and we are asking you to renew your commitment by completing this year's [membership renewal](#) ([click here](#) for step-by-step directions).

While you're logged in, take a moment to update your contact information and demographic fields! Simply select "My Profile" on the left-hand sidebar.

Think you may be eligible for the Retired Member status? [Click here](#) to see. If you are eligible, email [afwa@afwa.org](mailto:afwa@afwa.org) and we will revise your dues invoice.

### Why should you renew?

#### **Resources**

- \* *Accountability* - monthly e-newsletter delivered to your inbox
- \* *AFWA News Brief* - weekly news summary from leading industry publications
- \* AFWA's LinkedIn Group - member's only group facilitating member discussion forums, job postings and industry news postings
- \* Online Career Center - providing content that addresses your personal career as well as your hiring needs (sponsored by Accountemps and Robert Half Finance & Accounting)

#### **Conferences & Special Events**

- \* [Regional Conferences and Special Events](#)
- \* [2013 Accounting & Financial Women's Alliance Annual Conference](#)

#### **The Foundation**

The Foundation provides members opportunities for both scholarships and community outreach via financial literacy.

\* [Apply for Scholarships](#) \* [Volunteer through our Financial Literacy Initiative](#) \* [Donate to The Foundation](#) - help support scholarships and financial literacy initiatives

If you have any questions during the renewal process, please feel free to contact AFWA Headquarters at [afwa@afwa.org](mailto:afwa@afwa.org) or 703-506-3265.

The Accounting & Financial Women's Alliance stands for excellence. Your support is your commitment to our profession and to your career and life balance. Please renew your membership today!

Sincerely,  
Cheryl

## Who will win Member of the Year?

### Millie Culpepper

The votes are in and we have our results! But it's a surprise so come out on June 19th and see if your favorite nominee will be "crowned" Member of the Year!



**Kristina Diaz**  
**VP- Membership 2013-2014**



**Alison Aldrich**  
**Treasurer 2013-2014**

## May Opportunity Drawing Winners

### Kristina Diaz

**BOWERS MUSEUM** - Won by Speaker Kathy Johnson  
**OC Museum of Art** - Won by Member Karen Espinoza McGarrigle  
**GUEST DRAWING** - Won by HELENA KEITH See you soon!



## Membership Corner

### Alison Aldrich VP Membership & Treasurer

Hopefully last month you received a renewal notice from National because once again, it's membership renewal time for the majority of our members. If you received the notice, the link will take you to the new AFWA National site ([www.afwa.org](http://www.afwa.org)); You will then need your membership number, and your password. If I can help you with that please send me a note ([aaldrich7@yahoo.com](mailto:aaldrich7@yahoo.com)) and I'll get your membership number to you. When you're on the National site, please take a moment to update your personal information. If you did not receive an email notice, then it might be because your email has changed. The directions above are the same once you get to the site.

This month our membership is up to 44 members.

Please join me in welcoming our newest members: Anastacia (Annie) Lagado, Sandra (Sandy) Maldonado and a big welcome back to returning member, Cindy Taylor!

#### Members expiring in June (report as of 5/29/13):

First Name	Last Name	Join Date	Expire Date
Marcy	Beck	5/1/1979	6/30/2013
Renee	Brooks	5/1/2012	6/30/2013
Gail	Campbell	4/1/1994	6/30/2013
Inhee	Carter	3/3/2006	6/30/2013
Jessica	Clarke	6/30/2006	6/30/2013
Kristina	Diaz	7/1/2011	6/30/2013
Rita	Gittings	5/25/1997	6/30/2013
Rhea	Graf	7/22/1997	6/30/2013
Marilyn Jane	Hall	11/1/1974	6/30/2013
Meena	Kim	2/9/1999	6/30/2013
Penelope	Kinnear	4/12/2005	6/30/2013
Dolores	Lara	5/1/1986	6/30/2013
Irene	Mack	3/25/2003	6/30/2013
Lynn	Parker	7/12/2007	6/30/2013
Margaret	Robinson	7/22/2011	6/30/2013
Lorraine	Shoun	9/7/2005	6/30/2013
Barbara	Steelman	2/14/1989	6/30/2013
Deborah	Szul	11/1/1976	6/30/2013
Ruth	Zakowski	3/16/1995	6/30/2013

If you are interested in becoming a member of AFWA, please fill out a registration form at [www.afwa.org](http://www.afwa.org)

**Members:** Keep our records current--log in to AFWA National at [www.afwa.org](http://www.afwa.org) to update your contact information.

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