



Volume 58, Issue 3

September 2013

# Accounting & Financial Women's Alliance

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<http://www.chattanoogaafwa.com/>

*Chattanooga Chapter*

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## Labor Day

## AFWA MISSION STATEMENT

**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.**

# Chattanooga Chapter Meeting Info

**Date:** Tuesday, Sept 24, 2013

**Place:** The Chattanooga

**Time:** 11:30 a.m. to 1:00 p.m.

**Topic:** Lease Accounting Proposals

**Speaker:** Todd Ravin, Senior Audit Manager from KPMG

**CPE:** 1.0 hour

**Level:** Moderate

**Field of Study:** Accounting

**Learning Objective:** Accounting

**Prerequisites:** N/ A

Registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the

National Registry of CPE Sponsors,  
150 Fourth Avenue North, Suite 700  
Nashville, TN, 37219-2417.

Member \$20

Non-member \$25

**RSVP by noon on Wednesday,  
Sept 18, 2013 to:**

**Ashley Finch**  
**ashleyfinch@decosimo.com**  
**423-756-7100 x 1157**

**If you make a reservation and do not cancel it by the RSVP deadline, you will be charged since we must pay for all reservations supplied to The Chattanooga.**

**Menu:** Chicken bruschetta (pesto grilled chicken breast, fresh tomato-basil and garlic sauce), chef's vegetable and starch selection, and for dessert, Vanilla cheesecake with fresh fruit topping and sweet cream.

**Valet parking** is \$3. Drive to valet area, get a ticket from attendant, and pay AFWA Treasurer Danna McWilliams \$3 who will then stamp your ticket to give back to attendant. The \$3 includes the tip to the attendant.

**Receipt:** Remember to print your receipt and bring it for Treasurer Danna to sign. Or **register and pay on our website:**  
**[www.chattanoogaafwa.com/](http://www.chattanoogaafwa.com/)**  
Click 'next meeting,' fill out form, use Paypal.

# September Speaker



**Todd Ravin**  
Audit Senior Manager  
KPMG

Office (615) 248-5516  
Cell (919) 949-5050  
Email [travin@kpmg.com](mailto:travin@kpmg.com)

Todd is a senior manager in KPMG's Nashville Audit practice. He has more than nine years of experience providing audit, accounting, and business advisory services to public companies in various industries. After graduating from Vanderbilt University, Todd received his Masters of Accountancy in 2004 from the University of North Carolina - Chapel Hill.

Todd's audit experience with the firm has included working mainly with clients in the retail and consumer markets, manufacturing and industrial products, and transportation and logistics markets. He has planned, staffed, and directed engagement teams providing audit and Sarbanes-Oxley services to public as well as private companies. He has experience in coordinating and executing international audits including timely completion of SEC and statutory audits. In addition, Todd has worked with companies issuing financial statements in accordance with IFRS. Todd also has served as a National Instructor for KPMG for the past six years.

Todd is a Certified Public Accountant, licensed in North Carolina and Tennessee.

# President's Message



Debi Gilley

[tdttgilley4@comcast.net](mailto:tdttgilley4@comcast.net)

423-991-2773

Benjamin Franklin said "Tell me and I forget, teach me and I may remember, involve me and I learn." I find this to be very true in my life. When I become involved, I always find that I get the most out of the situation. Just being part of something or being part of a team is never enough.

Become actively involved in AFWA and see what a difference it will make in both your personal and professional life. I challenge you to look at the many opportunities that AFWA offers in the next few months and find a place to become involved. Step out of your comfort zone, join a committee where you know no one, or find an area that you have never been involved in and make it a priority to take an active role. Personal and professional growth can be challenging and maybe even scary, but the support and the encouragement that you can find in AFWA go a long way.

Encourage and support each other every opportunity you may have. Small acts of kindness and encouragement never go unnoticed. Make the most out of your AFWA membership. I hope to see you at many of our upcoming events between now and the end of the calendar year. In talking with the National Conference Expense Fund committee, it appears that we may have a record number of members from our chapter attending our national conference in October. Our national conference is both educational and fun, and I am thrilled that so many of our members are planning to attend. I have never talked with a member who has attended the conference who did not find it to be a very positive experience. Please do not hesitate to contact me at any time with questions or help in finding a place in AFWA that interests you. If you do not currently see a place in our organization that fits your needs, let me know. We may be able to work together to start something that would benefit you and other members. Our local AFWA is what we make it.

*Women Who Count*



Happy Birthday to our **September** birthdays

Mary Johnston – September 6<sup>th</sup>

Karen Forgey – September 10<sup>th</sup>

Lisa Coulter – September 18<sup>th</sup>

D. J. Christopher – September 21<sup>st</sup>

Audra Layton – September 21<sup>st</sup>

Amy Thomas – September 22<sup>nd</sup>

Suzanne Bennett – September 24<sup>th</sup>

If you haven't provided your birth month and day to Member Relations Chair Susan LeVan, please send to [Susan.LeVan@erlanger.org](mailto:Susan.LeVan@erlanger.org).

# Member News



Address, Phone and Email Update:  
Contact AFWA  
National Headquarters  
703-506-3265 or [www.afwa.org](http://www.afwa.org)



Door Prize  
Donors



Thank you to  
**Susan LeVan**  
for our upcoming  
September meeting  
door prize.

THANK YOU

Thank you to all members who  
have submitted month and day  
of birthday! How fun is it  
to receive a birthday  
card from our  
Member Relations Chair?  
It is REALLY FUN!



# Member News

Congratulations!

Congratulations to  
**Laurie Marson**  
on the recent birth of her  
new grandson!



Sympathy

Our sympathy is  
extended to  
**Carolyn Forgey**  
on the loss of her father.



# Member News

## AFWA FALL SEMINAR—Nov 13

The annual fall seminar is scheduled for Wednesday, November 13, 2013 at the Chattanooga Hotel located at 1201 Broad Street.

This event offers eight hours CPE credit and is open to both our membership and the community. Topics will include the Affordable Care Act, Tennessee sales and use tax, cloud computing, and fraud detection. Discounted pricing is available to AFWA members and to companies with multiple attendees.

**Registration information will be available in the coming weeks. Please mark your calendars and plan on attending in support of our chapter!**

For more information, please contact:  
Becky Creswell  
423.255.7972  
[deabec@covenanttransport.com](mailto:deabec@covenanttransport.com)  
Education and Legislation Chair





# Job Posting

## Financial Consultant III (Tax Accountant)-736337

### Description

Come and share your professional expertise with Unum, a Fortune 250 insurance company and marketplace leader in disability-based insurance products and return to work services. At Unum, our people truly make a difference, both in the lives of our customers and in the success of our company.

This position is in our Tax Department

### Principal Duties and Responsibilities

- Compile, analyze, and prepare sales/use tax returns.
- Demonstrated ability to perform research on multi-state sales/use tax issues.
- Research, investigate, and determine taxability of vendor invoices for sales/use tax.
- Coordinate with other team members to favorably resolve state audits.
- Participate in or lead special projects related to sales/use taxation.
- Coordinate with other departments and third parties to reduce the company's tax exposure, while ensuring compliance with tax reporting requirements and laws.
- Act as a liaison between various internal and external agents to ensure accurate and timely completion of tax returns.
- Research and respond to various internal and external inquiries regarding sales/use taxation.
- Reconcile and balance related accounts to maintain control and accuracy by identifying discrepancies and their cause; develop and assist in the implementation of processes that contribute to preventative and/or detective controls and procedures.
- Provide technical expertise and training for tax functions and make recommendations for process improvements.

May perform other duties as assigned.

### Qualifications

Additional Skills:

- Strong Microsoft Excel skills.
- Microsoft Access skills desirable.
- Ability to quickly learn/use software applications.
- Bachelor's degree in Accounting, Finance, Economics or Quantitative Analysis
- Five to seven (5-7) years of multi-state sales/tax related experience
- CMA, CMI, CPA preferred
- Knowledge of GAAP and statutory life insurance accounting is desirable.
- Ability to interpret and correlate an extensive variety of financial information.
- Strong analytical and problem-solving abilities
- Strong organizational skills and ability to work under time pressures.

Strong communication skills for working with various corporate levels and across functional teams.

Unum offers competitive pay, relocation assistance and excellent benefits. Come join us if you're interested in working in an exciting and challenging environment for a company that is on the move!

Unum is an equal opportunity and affirmative action employer regardless of a person's race, color, religion, national origin, age, disability, military status, gender or sexual orientation.

**Primary Location** Chattanooga, TN.

Thanks to Robin Shields for this job posting!

## ***Volunteers needed October 10 to take notes***

**Correction: Registration is waived, but CPE is \$10.**

The Galtere Institute (Finance for the Future Initiative) at UTC is hosting a Behavioral Finance Symposium, "The Biology of Investor Sentiment: Challenges for Risk Management," on Thursday, October 10. The Chattanooga Chapter of AFWA will be a sponsor of this event. Our sponsorship means that we will provide two people at each of the sessions to take notes which will be transcribed into handouts for the participants qualifying for CPE credit.

It is an honor for AFWA to be selected as a sponsor for this event. If you would be willing to be an ambassador for AFWA and can attend any of the sessions on October 10, please contact:

Marilyn Willis  
[marilyn-willis@utc.edu](mailto:marilyn-willis@utc.edu)

For information about the symposium:  
[www.UTC.edu/GaltereSymposium2013](http://www.UTC.edu/GaltereSymposium2013)



### **ACCOUNTING, AUDITING & TAX SEMINAR for 8 CPE HOURS**

Includes 5 hours of A&A, FRIDAY, SEP. 27, 2013 in Huntsville, AL—

At Redstone Federal Credit Union, 220 Wynn Drive, Huntsville, AL 35806 (go to the conference center building)

7:30 AM Registration & Full Breakfast; 8:30 AM-4:30 PM CPE Seminar/Lunch

<u>Registration Fees:</u>	<u>Early by Sept 19 postmark*</u>	<u>Late</u>
_____ Member	\$90	\$120
_____ Non-member	\$130	\$160

Fees include full hot breakfast, 2 snack breaks, buffet lunch, and CPE certificate.

No refunds after SEP. 23. Seating is limited so register early. Dress code is business casual.

Please make checks payable to AFWA. Mail registration and check to: AFWA Huntsville Chapter, P.O. Box 22502, Huntsville, AL 35814

For information, contact Sylvia Ayers, Education & Legislation Chair, at (256) 964-5327 (work) or (256) 603-9537 (cell); email: [sayers@colsa.com](mailto:sayers@colsa.com)

**CPE  
Sept  
27**

## 40th Annual Accounting and Finance Lecture Series

**Bernard Baumohl**

Chief Global Economist

The Economic Outlook Group, LLC (Princeton, NJ)

Wednesday, October 16, 2013

11:30am - 1:00pm

Chattanooga Convention Center



### **About the Speaker:**

Bernard Baumohl is chief global economist at The Economic Outlook Group. He is well known for being ahead of the curve in assessing the direction of the U.S. and world economy. Previously, Mr. Baumohl was also an award-winning economics reporter with *TIME* magazine who covered the White House, Federal Reserve and Wall Street. A sought-after international speaker, Mr. Baumohl has been recognized for his forecasting accuracy.

His economic and geopolitical projections are frequently cited in the *Wall Street Journal*, *Washington Post*, *New York Times*, *Business Week*, and the *Financial Times*. He has also lectured at New York University and Duke University, and served as a commentator on TV's *Nightly Business Report*. Mr. Baumohl is author of *The Secrets of Economic Indicators: Hidden Clues to Future Economic Trends and Investment Opportunities* (Pearson Education). The best-selling book is in its 3rd edition and has been translated into several languages, including Chinese, Japanese, Russian, and German. He is also a recipient of the John Hancock Award for Excellence in Financial Journalism. Mr. Baumohl holds an M.A. from Columbia University's School of International Affairs.

### **Purpose of the Series**

To bring to the College and to the community outstanding individuals in the areas of accounting and finance and to provide a basis for the enrichment of and mutual cooperation between participating professional groups in the area.

<http://www.utc.edu/Academic/Business/ALS.php>

#### **SPONSORS**

CFA Society of East Tennessee

Tennessee Society of Certified Public Accountants

UTC College of Business

#### **Co-Sponsors**

Accounting & Financial Women's Alliance

Association of Government Accountants

Association of Certified Fraud Examiners

Beta Alpha Psi

Financial Executives International

Institute of Internal Auditors

Institute of Management Accountants



## Race for the Cure Sept 29 Finley Stadium

The Susan G. Komen Race for the Cure will be held Sunday, September 29, 2013. The race is at a new location this year, Finley Stadium.

Our AFWA chapter does not have a team this year, but would like to encourage our members to help support this worthy cause. If you don't want to walk or run you can register to "Sleep in for the Cure" and receive a lovely pillow case. I have a couple of these pillow cases because I "slept in for the cure." It was the only way I could get it and, of course, I had to have a "pair."

For more information on registering, donating, or to just learn more about the race, visit [www.komenchattanooga.org](http://www.komenchattanooga.org). Once on the website go to the Komen Race for the Cure tab for registration.

75% of net proceeds from the Race stay in our Chattanooga/ North Georgia communities to fund mammograms, breast cancer treatment and health education materials.

The remaining 25 percent will support groundbreaking research.

Carol Drinnon  
[cdrinnon@twharch.com](mailto:cdrinnon@twharch.com)  
Special Activities Chair



## Web News

Thanks, Beth Terry, for your work on our publicity/website!

AFWA Chattanooga is now on **Facebook...LIKE US...**  
<http://www.facebook.com/AFWAChattanoogaChapter>

AFWA Chattanooga is now on **Twitter...**  
<http://twitter.com/AFWAChattanooga>

AFWA Chattanooga **website** has been updated and has a new address: <http://www.chattanoogaafwa.com/>



### **Online payment and registration**

for monthly meetings has been established on our website: click “next meeting,” fill out form, use PayPal! We can also buy raffle tickets on the website.

## **MEMBER RELATIONS COMMITTEE**

The Member Relations Committee’s goal for this year is to establish a more personal connection with our members. We would like to know what is happening in your life – personally and professionally. Have you passed the CPA exam? Received a promotion? Had a new baby or grandchild? Changed jobs? We are interested in any news regarding you or your family that you are willing to share with us.

Do you know some info about a fellow AFWA member but think they are too shy (or would feel like they were bragging) if they shared it? Please share that information with us. Any information provided by a member regarding another member will not be published without the permission of the pertinent AFWA member.

The committee would also like to maintain a list of members’ birthdays. Please e-mail your birth month and day (not year!) to me.

If you have any items to share regarding yourself or a fellow AFWA member, please call or e-mail me.

Susan LeVan, Member Relations Committee Chair  
[Susan.LeVan@erlanger.org](mailto:Susan.LeVan@erlanger.org) 778-4761



## Membership Meeting Check-In

In an effort to streamline the check-in process at the membership meetings, the finance chair is requesting those members who need a receipt to please print out the "AFWA Receipt" template, fill in your name and amount and bring it with you to the next membership meeting for her signature.

**Danna McWilliams, Treasurer**  
 dmcwilliams@lbmc.com  
 423-756-6585












# Calendar of Events

Date	Time	Place	Event	For Further Information Contact
Tues, Sept 17	4-6 pm	UTC	Beta Alpha Psi "Meet the Firms"	Kathy Lane 423-756-7100 kathylane@decosimo.com
Wed, Sept 18	noon	_____	Register for Sept Meeting	Ashley Finch 423-756-7100 ashleyfinch@decosimo.com
Tues, Sept 24	11:30-1:00	The Chattanooga	Membership Meeting	Ashley Finch 423-756-7100 ashleyfinch@decosimo.com
Fri, Sept 27	All Day	Huntsville	AFWA Huntsville Chapter CPE Seminar	Sylvia Ayers 256-603-9537 sayers@colsa.com
Tues, Oct 8	11:30-1:00	The Chattanooga	Board Meeting	Debi Gilley 991-2773 tdttgilley4@comcast.net
Thurs, Oct 10	All day	Doubletree	Behavioral Finance Symposium	Marilyn Willis 423-425-4179 marilyn-willis@utc.edu
Wed, Oct 16	11:30-1:00	Chattanooga Convention Center	Accounting & Finance Lecture Series	Ashley Finch 423-756-7100 ashleyfinch@decosimo.com

# Board and Committee Contact Info

	Preident Debi Gilley		423-991-2773 <a href="mailto:tddtgilley4@comcast.net">tddtgilley4@comcast.net</a>
	President Elect Mallory Smith	Membership	423-265-6522 <a href="mailto:Mallory.smith@accountemps.com">Mallory.smith@accountemps.com</a>
	Vice President Marilyn Willis	Public Relations Co-chair	423-425-4179 <a href="mailto:marilyn-willis@utc.edu">marilyn-willis@utc.edu</a>
	Treasurer Danna McWilliams	Finance	423-756-6585 <a href="mailto:dmcwilliams@lbmc.com">dmcwilliams@lbmc.com</a>
	Recording Secretary Susan LeVan	Member Relations	423-778-4761 <a href="mailto:Susan.LeVan@erlanger.org">Susan.LeVan@erlanger.org</a>
	Corresponding Secretary Ashley Finch	Chapter Development	423-756-7100 <a href="mailto:ashleyfinch@decosimo.com">ashleyfinch@decosimo.com</a>
	Director Ex-Officio Karen Forgey	Yearbook	423-521-8591 <a href="mailto:forgeyks@aol.com">forgeyks@aol.com</a>
	Director Carolyn Richie	Bylaws	423-778-4782 <a href="mailto:Carolyn.richie@erlanger.org">Carolyn.richie@erlanger.org</a>
	Director Becky Creswell	Education Legislation	423-463-3363 deabec@ <a href="http://covenanttransport.com">covenanttransport.com</a>

# Board and Committee Contact Info

	Director D.J. Christopher	Scholarship	423-752-5906 djcblood@bloodassurance.org
	Director Beth Terry	Publicity/Website	423-756-6585 bterry@lbmc.com
	Laurie Marson	Public Relations Co-chair	423-668-2731 laurie.marson@ey.com
	Committee Chair Robin Shields	Programs	423-294-1578 RShields@unum.com
	Committee Chair Mary Johnston	Newsletter	423-400-6582 mary8921400@comcast.net
	Committee Chair Carol Drinnon	Special Activities	423-756-5046 cdrinnon@twharch.com
	Committee Chair Kathy Lane	Student Activities	423-756-7100 kathylane@decosimo.com
	Committee Chair Christie Jordan	Strategic Planning	423-209-8689 jordan_chris@hcde.org
	Committee Chair Tracy Hughes	Hospitality	423-756-6585 thughes@lbmc.com