



Volume 57

Issue 3

## MEMBERSHIP MEETING

The 4 Operating Priorities of Taxpayer Education and Communication

Tuesday - November 18, 2003

U. S. Bank Building  
Amphitheatre Conference Room - Lower Level  
1350 Euclid Avenue, Cleveland, OH 44115

(Attached Garage: Parking \$5.00 after 4:00 pm)

5:15 pm social, 5:45 pm dinner, 6:30 pm speaker

\$13.50/members - \$18.50/guests - Chicken Piccata w/rice, vegetables,  
salad w/roll & butter and beverage

LaTanya J. Bacon, Senior Tax Specialist, Taxpayer Education and  
Communication, Internal Revenue Service

Please RSVP to Ilona Daw-Krizman @ (216) 875 - 6286 or daw@ferro.com  
by Thursday, November 13, 2003 - Vegetarians need to advise.

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Chapter web site: <http://community.cleveland.com/cc/accountants> National web site: [www.aswa.org](http://www.aswa.org)

PRESIDENT'S MESSAGE

The 63rd Annual Meeting and Conference in San Diego went well. It was the first ASWA Conference that I have attended, after nine years of membership. Finally! The conference was packed full of events, and followed soon after I attended OSCPAs popular annual Accounting Show at the I-X Center. The ASWA conference has a different personality and approximately half of the registrants were first time attendees. I recommend that every member attend at least one ASWA annual meeting and conference.

There were many personal development sessions that can only be found at an ASWA conference, including early bird and post-conference sessions, to earn additional CPE. I learned a lot from the conference and obtained copies of handouts from other concurrent sessions. Topics included "Communicating with Diplomacy", "How Smart Women Retire Rich", and "Database Basics for Accountants". These are some of the topics not often found at local conferences.

As an example of the material presented at the conference, included in this issue are the four basic types of inter-personal relationships. Keep in mind that people change into the other types as needed, and some people are a combination of two types. See which one you are. I determined that I am primarily a thinker. While I can relate to each of you, which is sometimes not easy, as it is not natural for me, I have made progress to learn and grow.

At the conference, I networked with Headquarters personnel in person and finally met face to face some of the people with whom I have communicated via email and facsimile. Lee Buswell is the manager at Headquarters and has been there for years, assisting and answering our questions. I also networked with members from other Chapters throughout the country and learned more about them and the Chapters that they represent.

Also at the conference, we enjoyed browsing through the exhibits and EFWA (Educational Foundation for Women in Accounting) silent auction for gift baskets that came from all over the country, including Alaska and Hawaii. In addition to scholarships, EFWA provides some of the most excellent speakers and topics that I have seen to date. Although our chapter was unable to donate a basket on short notice for the conference, I obtained a better sense of what would make a good basket. I believe that we should have a basket for next year's EFWA silent auction, to be held at the next annual meeting and (Joint ASWA/AWSCPA) conference in Chicago (more detail can be found in this issue).

I already have several items representative of the Cleveland area or its culture that could be contributed to the basket. If someone would obtain a LeBron James shirt from the Cavaliers, a CD from the Rock & Roll Hall of Fame and a used, large basket (or a collectible box... be creative!) that is collecting dust, I believe that is a good start. Malley's Chocolate Factory is nearby, so we'll include a box for the basket. I would like the basket to have a total estimated value of \$150 to \$200, with bidding to start at \$75 to \$100.

Please welcome **Hilary Hilow** from CSU, to the Cleveland Chapter. As a student affiliate, she is the President of CSU's AA/BAP for the second year and is one of our scholarship recipients. She is excited to be sharing information with her classmates. She hopes to participate more fully with us next semester.

Plante & Moran, PLLC, based in Southfield, MI, (employer for our local Regional Director, **Susan Tripepi**.) is the winner of the Balance Award for Accounting Firms with 500+ employees. The award was presented at the Balance Awards Gala on Friday evening of the conference. Susan nominated and accepted the award on behalf of Plante & Moran. Congratulations! This is definitely your year! We wish Susan our support as she prepares for November's CPA Exam. We know you can do it!

Please join us at the chapter meetings to learn what is new, earn CPE credit, support our speaker program, network, have fun and eat well. For those who do not have sufficient CPE for the triennial period that ended October 31, 2003, CPEs earned in November and December can be used retroactively to the reported triennial.

PRESIDENT’S MESSAGE (Continued)

We must have sufficient attendance or we will once again discontinue guest speakers at our meetings. We would like to continue holding our own meetings. I also would like to remind persons that there is a standing rule that we bill “no-shows” for dinner if they do not cancel in time. We really need each person’s attendance, participation and commitment if we are to be an active and respected chapter. At October’s meeting, we had excellent speakers and a presentation that really deserved more than the eight members and guests that attended. We have to guarantee a minimum attendance for speakers before they will come.

Please contribute to the Chapter’s Scholarship Fund through Entertainment Books and Season’s Greeting Card. Ask corporations to participate. The form for Season’s Greeting is reprinted in this issue. You may contribute via mail or in person, by November 28<sup>th</sup>. The more contributions we receive, the higher cash scholarship that we can offer! At the October meeting, the Board approved a \$250 for this fiscal year’s cash scholarship.

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(from [www.aswa.org](http://www.aswa.org))

**The ASWA/AWSCPA Joint Inspired Solutions Conference  
November 10-12, 2004, Chicago, Illinois, Hotel Inter-Continental**

What is an Inspired Solution? It's more than just a correct answer...an Inspired Solution is a response to a unique set of circumstances. An Inspired Solution carries weight...it reflects passion and spirit. In short, an Inspired Solution does more than just respond to a challenge...it drives you to be your very best.

That is precisely what we intend to accomplish at the 2004 ASWA/AWSCPA joint conference...to help you achieve sustained excellence, to be your very best both professionally and personally.

We believe that bringing together ASWA and AWSCPA in this joint format is in itself an Inspired Solution. More opportunity...more energy...more ideas...more fun.

We know the demands on your time are considerable, and like all professional women, you are pulled in different directions in all aspects of your life. What is your own Inspired Solution? Take a few days away from the cacophony of daily demands to focus on yourself...recharge your batteries...energize your mind and spirit.

Break from the routine...Inspired Solutions await you.

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Four Basic Relationship Types (Marsha Petrie Sue, MBA, [www.MarshaPetrieSue.com](http://www.MarshaPetrieSue.com))

- 1) **Relater** – Slower, people-oriented, relationships and care. People can best cope with Relaters by building a relationship.
- 2) **Socializer** – Faster, people-oriented, fun and talk. People can best cope with Socializers using goals and rewards and recognition.
- 3) **Thinker** – Slower, task-oriented, error free and practical. People can best cope with Thinkers by giving them what they want, such as data.
- 4) **Director** – Faster, task-oriented, power and control. People can best cope with Directors by giving them the bottom line.

**The Cleveland**



# **PRESENTS**

A tour of

**The Plain Dealer Plant**

The plant is located near I-480 in Brooklyn, Ohio

The tour includes museum, shipping area, warehouse,  
2 floors of presses and video.

**Date: November 20, 2003**

**Tour begins at 3:00pm**

Sponsored by The Cleveland Chapter of the IMA

Please use this form to make reservation for you and your guests, family and friends

Name: \_\_\_\_\_ Phone: \_\_\_\_\_ Company: \_\_\_\_\_

Name: \_\_\_\_\_ Phone: \_\_\_\_\_ Company: \_\_\_\_\_

Name: \_\_\_\_\_ Phone: \_\_\_\_\_ Company: \_\_\_\_\_

TOTAL RESERVATIONS: \_\_\_\_\_ TOTAL DUE: \$ 0.00

All cancellations must be made 48 hours in advance or charges will be invoiced accordingly.

Fax to Honey Wess at [216] 525-0500 or call [216] 834-0700

e-mail: honey\_wess@yahoo.com

RSVP by Monday, November 17, 2003

**American Society of Women Accountants**  
**33<sup>RD</sup> Annual Tax Seminar**

**Friday, November 14, 2003**

**8:30 AM - 4:30 PM**

**Hooligan=s Café, Inc.**

**7240 Oswego Road, Liverpool, NY 13090**

**ASWA**

**Central New York Chapter #29**

**c/o Roseanne Battoe**

**222 Hanover Avenue**

**Liverpool, NY 13088**

**SPEAKERS**

**Ronald Pratt, CPA, Senior Tax Manager, Dannible & McKee, LLP**

**Edward Jones Representative**

**William Misiaszek, Outreach Specialist/Problems Resolution Officer, NYS Department of Taxation & Finance**

**Elizabeth Hartnett, Esquire, Partner, Hunter and Hartnett**

**Edward Onisk, Social Security Administration, Technical Expert**

American Society of Women Accountants  
**33<sup>rd</sup> Annual Tax Seminar**

**Friday, November 14, 2003**  
**8:30 AM - 4:30 PM**

**Hooligan=s Café, Inc.**  
**7240 Oswego Road, Liverpool, NY 13090**

**Schedule**

8:00 AM - 8:30 AM Registration  
8:30 AM - 9:45 AM **Individual Tax Update**, Ronald J. Pratt, CPA  
9:45 AM - 10:00 AM Break  
10:00 AM - 11:15 AM **Section 529 Update**, Edward Jones Representative  
11:15 AM - 12:15 AM **New York State Tax Law Update**, William Misiaszek, NYS  
12:15 AM - 1:00 PM Lunch  
1:00 AM - 2:00 PM **Corporation Tax Update - TBA**  
2:00 PM - 2:15 PM Break  
2:15 PM - 3:30 PM **Dealing with Second or Troubled Marriages**,  
Elizabeth Hartnett, Esquire  
3:30 PM - 4:30 PM **Social Security Administration**, Edward Onisk, Technical Expert

**Qualifies for 8 CPE Credits**

**For More Information, call Roseanne Battoe 457-2885**

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. NASBA phone number: 615-880-4200  
Web site: [www.nasba.org](http://www.nasba.org)

We have entered into an agreement with the Office of Director of Practice, Internal Revenue Service to meet the requirements of 31 Code of Federal Regulations, Section 10(g) covering maintenance of attendance Records, retention of program outlines, qualifications of instructors and length of class hours. This agreement does not constitute an endorsement by the Director of Practice as to the quality of the program Or its contribution to the professional competence of the enrolled individual.®

Learning objectives:	Current income tax review & update
Course level:	Overview & update
Course prerequisites:	Advance preparation: None
Instructional delivery method:	Live lecture
Complaint resolution:	Contact Roseanne Battoe 457-2885 Records are retained for five years from seminar date.

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**REGISTRATION FORM**

**Make Checks Payable to: ASWA CNY Chapter #29**  
**Mail to: Roseanne Battoe**  
**222 Hanover Avenue, Liverpool, NY 13088**

Name: \_\_\_\_\_ Certificate or SS # \_\_\_\_\_  
Firm: \_\_\_\_\_ Bus. Phone: \_\_\_\_\_ Home Phone: \_\_\_\_\_  
Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

**Member Fee: \$35.00**

**Non-Member Fee \$75.00**

**RESERVATIONS DUE BY NOVEMBER 8<sup>TH</sup>, 2003**  
**No refunds unless canceled by November 10<sup>TH</sup>, 2003**  
**Qualifies for 8 CPE Credits**

**ASWA CLEVELAND CHAPTER  
SEASON'S GREETINGS CARD FORM**

JOIN FELLOW MEMBERS AND ASSOCIATES OF ASWA CLEVELAND CHAPTER IN SENDING HOLIDAY WISHES AS A GROUP TO EACH OTHER WITHOUT THE NEED FOR SENDING INDIVIDUAL CARDS!

THE CONTRIBUTING SIGNATURES WILL BE USED TO DESIGN A CENTRAL PATTERN. THE PATTERN OF SIGNATURES WILL THEN BE PUT ON APPROPRIATE MATCHING HOLIDAY STATIONERY. THIS YEAR'S EXPECTED THEME AND DESIGN WILL BE A TREE.

ALL NET PROCEEDS WILL BENEFIT THE **SCHOLARSHIP** FUND! THEREFORE, THE PROJECT WILL BENEFIT FUTURE ACCOUNTING STUDENT(S.)

THE SUGGESTED **MINIMUM** CONTRIBUTION IS \$10 (TEN DOLLARS).

TO PARTICIPATE, PLEASE ISSUE A CHECK PAYABLE TO **ASWA CLEVELAND CHAPTER** AND SIGN YOUR NAME WITHIN THE BOX BELOW AS YOU WISH IT TO APPEAR IN THE SEASON'S GREETING CARD. PLEASE BE ADVISED THAT THE SIGNATURE MAY BE REDUCED AS NEEDED TO FIT THE RESULTING DESIGN APPROPRIATELY.

PLEASE SEND THE CHECK AND THE BOTTOM OF THIS FORM NO LATER THAN **FRIDAY, NOVEMBER 28th** TO:

SUNNY SHELLITO  
9621 ELSMERE DRIVE  
PARMA, OH 44130

THANK YOU FOR YOUR PARTICIPATION! I LOOK FORWARD TO SEEING EACH OF YOU AT THE DECEMBER HOLIDAY PARTY. LET'S PLEASE BE THANKFUL, BE MERRY, DRINK AND EAT WELL IN FELLOWSHIP TOGETHER!

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PLEASE SIGN YOUR NAME BELOW WITHIN THE BOX:

**SCHEDULE OF EVENTS:**

- November 11, 2003 Akron/Canton ASWA Membership Meeting  
Dinner at Café Piscatelli  
Speaker: Norma Wrist of CEO Consulting, Inc.  
Topic: Marketing Yourself in Any Business
- November 18, 2003 Cleveland ASWA Membership Meeting  
U S Bank Building  
Topic: IRS Taxpayer Education and Communication
- November 20, 2003 Central New York ASWA Annual Tax Seminar  
Hooligan's Café, Inc., Liverpool, NY  
8 hours CPE  
RSVP to Roseanne Battoe (Registration form enclosed)
- November 20, 2003 Cleveland IMA Plain Dealer tour  
(Registration form enclosed)
- December 12, 2003 Cleveland ASWA Holiday Party  
Pickwick & Frolics (?)
- December 16, 2003 OSCP Annual CPE Day  
Cleveland Hilton South Hotel/Rockside Road

**American Society of Women Accountants**

Denise T. Brock, CPA  
2184 Green Ridge Drive  
Wickliffe, OH 44092-2011

**RETURN REQUESTED**