



**American Society of Women Accountants
San Francisco Bay Area Chapter #011**

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Get LinkedIn!

Go to linkedin.com
and connect with
ASWA members.

Expand your network!

Navigating Volatile Markets—A Guide for Investors October 21, 2009



It's especially difficult now to know when and how we should invest in the new post-meltdown market. **Laura Pilz** will provide some hints and tips for making sound investment decisions. She is a Financial Advisor with the Merrill Lynch Private Client Group in San Francisco, and works with individuals and families to help them achieve their financial objectives and build their wealth. Her practice focuses on planning strategies and investment management.

Laura Pilz is a Financial Advisor with the Merrill Lynch Private Client Group in San Francisco. As a Financial Advisor, Laura works with individuals and families to help them achieve their financial objectives and build their wealth. Her practice focuses on planning strategies and investment management.

Laura has worked in the financial services industry for 30 years and is a CFP® certificant, a designation awarded by the Certified Financial Planner Board of Standards, Inc. She has also achieved the CRPC® Chartered Retirement Planning Counselor, designation.

Her education includes: a BA in Economics from Chatham College and an MBA in Finance and Accounting from The University of North Carolina at Chapel Hill. She serves on the Boards of the San Francisco Ladies Protection and Relief Society, the Maybeck Foundation, and The Financial Women's Association of San Francisco.

**Location: Littler-Mendelsohn Conference Room
650 California Street, 20th Floor, San Francisco, CA 94111**

Cost: ASWA Members: \$25. Non-members: \$30
Want a discount? Use PayPal and get \$5 off the price!

Members: Bring a guest for a \$10 discount on a future meeting!

Need additional information? Contact: hospitality@aswa-sf.org

We welcome suggestions for topics and/or speakers. Contact the Programs Chair or any Board Member.

What You Might Have Missed!
September Meeting
Long Term Care Insurance: Critical Considerations for You and Your Family Members



Long Term Care Specialist Lee Abel Bandele is our speaker. She is a frequent lecturer at California Pacific Medical Center. She will discuss how LTC Insurance works, who should consider making the purchase, and the tax implications for individuals and companies.

Angel Island Picnic

We couldn't have picked a better day for our annual San Francisco/Silicon Valley picnic on Angel Island. The weather was beautiful, the food was great, and the company was fabulous. Hope to see you all next year!



Lisa's fiance Mark bbqs while Gaby's husband Kai supervises. Thanks to Lynn for bringing the bbq utensils!





Thanks to Alla for the photos.

American Society of Women Accountants Offers Scholarship

In order to promote Accounting as a profession the San Francisco and Bay Area Chapter of ASWA is pleased to be able to offer a **scholarship of \$1,000** to a third or fourth year student in accounting. In addition to the scholarship the successful candidate will receive a free annual membership to ASWA and the support and mentorship of an active group of accounting professionals.

To be considered for this award, which will be issued in December 2009, contact Carole Weller at scholarships@aswa-sf.org.

All queries and correspondence should be addressed to:

Carole Weller
Scholarship Chair
Robert Half International
50 California Street, 10th Floor
San Francisco CA 94111.



Marketing: Driving new business on a budget

I work with professional services firms—including CPAs—to rebuild the practices that have been sabotaged by the bad economy. Years of study and experience never included classes on marketing, business development or running a small business.

Some of my clients with years of experience have relied on referrals to build successful practices, but they are finding that their businesses are no longer self-sustaining. For the small business owner, the loss of a few clients represents a significant loss of revenue, but when they think of marketing, they think of expensive advertising which they can't afford. Let's take a look at marketing efforts for the small business owner that fit small budgets.

If it's any consolation: You've got company

You're not alone. It's not about you or your commitment to your clients, but a matter of economics. When people are getting furloughed and losing their jobs, they find ways to cut back, and that may include doing their own taxes—often with disastrous results—but for you, it translates into significant loss of revenue. I help my clients get their practices back on track.

Most important: Staying top of mind

Marketing is about staying top of mind, and you need to be staying in touch with the clients you have lost. They need to know that you are still there once the economy starts to rebound. Send a letter or a note, perhaps an article or clipping that has relevance for them. Develop a newsletter for monthly or quarterly communications.

Learn new strategies: Think free and cheap

If you've got some extra time these days, use it. There are all kinds of classes from a range of facilities.

- The Small Business Association (SBA) has excellent workshops for the small business owner, and many of these are free.
- Check out your community's adult schools—they offer classes for a very low fee. Learn to use Microsoft applications which are a standard part of business communications.
- Think about trading services with another professional. This is the old-fashioned barter system and it still works.
- Learn to use social media applications. Like it or not, electronic delivery is the wave of the future. Create free accounts in Facebook, LinkedIn, and yelp. Learn to Twitter. Create a company profile on Google and Yahoo.
- Think strategic alliances. With whom can you partner to leverage each other's strengths? For example, I collaborate with a website developer. I refer clients who need to build a website, and he sends me clients who need help with content development and project management. Look for alliances, not necessarily clients. Think "whom do you know whom I want to know?" This can be a hard concept to grasp at first, but it significantly opens up a whole new arena of potential clients.

It's time to get serious about a website: You can't NOT have one

People go online to shop for a CPA in the same way that they search for another product or service. Prospective clients will look at your site and make a decision about whether or not they want to work with you. You have just one chance to make a first impression, so make this work and make it about you.

Where to begin? Look for websites that you like—see what other CPAs are doing. Review the layout, color schematic, content. Don't be shy about stealing ideas from someone else—that's what we love about the internet.

Something to think about as you plan your site: the most important information is your contact information--make it easy for people to get in touch with you.

Everyone talks about brand: What is it?

- The look and feel of your business card and website
- Who you are, your integrity, your commitment to your clients
- Having a consistent message—one that people will instantly recognize as yours
- What you do better than anyone else; think about what sets you apart

Hate networking: Get over it

I don't know any successful entrepreneur who has not mastered the art of networking. Bite the bullet and get out there. I tell my clients that they should go to at least one networking event a week. I set a new world record a few weeks ago by going to five, which is excessive. Check out the calendars for Chambers of Commerce and look for mixers--they are fun and cheap, attended by other small business owners just like you.

- Go with a friend, and remember that everyone in the room is looking for new clients and there will be people who are every bit as uncomfortable as you, but nobody has to know this.
- Set some goals. Walk away with at least one really good connection—someone who will become part of your network.
- Follow up—don't drop the ball on the effort you have put into your networking event. Identify those with whom you want to stay in touch, and add these contacts to your mailing list. Send them an email, or better yet, a handwritten note--these never go out of style.
- Develop and practice what we call your 30-second elevator speech—it's the common denominator of networking. You have 30 seconds to talk about what you do. Like your website, this is another first-impression opportunity, so don't waste it. Develop a little script, then rehearse it to make it sound natural—make this persuasive.
- Volunteer. There is an infinite number of worthy causes to which you can donate your time. Think about what interests you. Volunteers are a critical component of the business model for many nonprofits. An additional bonus? You will make new friends and find new venues for networking.

Speaking and writing: Be on the lookout for opportunities

This may be a little scary for the beginner, but pay attention to program speakers. Can you see yourself doing that? Is the information you have to share better, more relevant than what you're listening to? Find out what the requirements are for speakers. You will find that there's a waiting list, which is perfect for you. Get on the calendar, then get busy developing a program.

Do you think you're a good writer? Identify publications that would be a good medium for you to share your experience. Find out what the demographic information is--don't waste your time if you're not targeting your audience.

Join one networking group that meets regularly, preferably weekly. This group becomes your core networking organization. Think about joining Toastmasters—this group is amazing in terms of learning how to speak in front of groups.

Keep in mind that generating new business is a process and there is a sales cycle. Don't attend a networking event, then give up because you didn't get any new clients. People need to get to know and trust you. For someone to refer a new client to you is an endorsement of your skill as a CPA.

Working with Janet

I work with small professional services sectors, including CPAs, to develop marketing and business development strategies that help my clients increase sales by 15% a quarter. More than 20 years of comprehensive marketing and business development experience. Creation of marketing and public relations strategies, messaging and branding, websites, newsletters and brochures.

Call me for a complimentary consultation, and let's start getting your practice back on track! Janet Peischel, 510.292.1843, www.top-mindmarketing.com.

JOBS NOW! Wage Subsidy Program

JOBS NOW! Is a subsidized employment program administered by the Human Services Agency (HSA) and funded with federal stimulus dollars. Through JOBS NOW! Employers can be reimbursed for 100% of the wages paid to a newly hired eligible employee. Job seekers must be San Francisco residents but the employer does not need to be located in San Francisco.

For more information contact Olga Munoz at (415) 401-4885 or visit www.sfhsa.org or call 877-JOB1NOW.



The 2009 Joint National Conference in Las Vegas at The Palms Casino Resort is only a month away! Have you registered yet?

- **Keynote Speaker: Charlotte Stallings, Getting Smart About Money: Regardless of the Economy**

Charlotte Stallings is an investment strategies expert for Getting Smart! LLC. This dynamic speaker will teach you how to avoid the financial pitfalls and move from just spending your money to making your money work for you! The information from this keynote address will help you learn how to create a wealthy future. Television and print media such as CNN and *The Wall Street Journal* have relied on Charlotte's keen thinking for years.

- **Four Tracks: Accounting & Auditing, Controllershship, Personal & Professional Development and Tax**

Go green! Don't miss the session, The Steps to Going Paperless, on Monday, October 29th. Roger Mongeon, Vice President of Doc.It, will discuss the steps for your company to go paperless, best practices, and data retention and archiving.

- **Hear ASWA National Chapter Partnering Committee member, Melody King, speak on Financial Literacy**

ASWA National Chapter Partnering Committee Member, Melody King, will speak on financial literacy. This session will give each of us ideas on how to set up a financial literacy program in your hometown. Also, participants will gather information on already available programs and how to customize to fit your communities' needs.

- **Register today to get the Early Bird rate. The deadline is September 25, 2009 at 5pm Pacific time so don't delay. Save money and [REGISTER HERE](#) TODAY!**
- Continuing Professional Education Hours: Select from 61 hours of CPE credit to earn up to 24 hours of credits at this conference.
- Come stop by our exhibitors' booths and thank our sponsors. The JNC's exhibitors and sponsors include BDO Seidman, L.L.P., ADP, Financial Executives International (FEI), The Walt Disney Company, Crowe Horwath, L.L.P., Accountemps and Robert Half Finance and Accounting, AON Insurance Services, Becker Professional Education, EzyRecon, Federal Deposit Insurance Corporation (FDIC), FINRA-Financial Industry Regulatory, Institute of Management Accountants (IMA), Internal Revenue Service, Kaplan, MassMutual, Pridestaff, U.S. Securities and Exchange Commission (SEC) and YAEGER CPA Review.
- For complete conference information, please view the online at: <http://www.awscpa.org/2009conference/index.php>.

"Insider Secrets: Working with a Recruiter"

Join us on November 2, for an insider's perspective on working with a recruiter. Bay Area Career Center (BACC) has selected a panel of some of the best Bay Area Recruiters who have years of experience working with job seekers.

Do you know what a recruiter looks for in a candidate? Do you know the difference between a retained, internal, external and contract recruiter? How has the current economy impacted a recruiter's role? What is the effect on the job seeker?

Our panel will feature a variety of recruiters and will be followed by a Q and A session. Pre-registration is required as space is limited to 30 people - please see billing information below.

Date: Monday, November 2, 2009

Time: 6:00 - 7:30 pm

Location: 4th Floor Conference Room, 57 Post Street, San Francisco, CA

Cost: \$5 (pre-register as space is limited)

Checks can be sent to:

BACC

Attention: Recruiter Panel

57 Post Street, Suite 804

San Francisco, CA 94104-5027

Register: hilary-romanoff@hyzen.com, 415-640-8190



San Francisco Bay Area Chapter, # 011

**Our chapter regularly meets on the third Wednesday of each month
at:**

**October Meeting will be held at:
Littler-Mendelsohn Conference Room
650 California Street, 20th Floor
San Francisco, CA**

**Cost via Paypay: Members of ASWA - \$20
Nonmembers - \$25
Students -\$15
Cost at the Door: Members of ASWA - \$25
Nonmembers - \$30
Students -\$15**

[Parking at Embarcadero Center](#)

Join our vibrant Chapter for networking, CPE credits, resources for professional development and training and the chance to make a difference in our community.

Join us...guests are cordially welcomed!!

***Would you like to be on our evite/email list? Or do you want to stop
receiving announcements?***

For either go to webmaster@aswa-sf.org.



San Francisco Bay Area Chapter

ASWA Silicon Valley Contact Information:

Silicon Valley Chapter #103
www.aswasiliconvalley.org

CHAPTER PRESIDENT: Linda Bowman

Phone: 408-866-2004

lynda@bowmanaccounting.com

RSVP for meetings –408-235-0828

We prefer that you use Evite to RSVP, so interested parties can contact Linda and be added to the email list.

The Silicon Valley Chapter of ASWA meets the fourth Tuesday of each month (except November and December) at the Biltmore Hotel in Santa Clara. Guests are always welcome!

A dedicated partner of the ASWA and your business.



Accountemps and Robert Half Finance & Accounting are proud to be the *Exclusive Staffing Visionary Partners* of the ASWA. Through our partnership, you have access to the most up-to-date information on staffing, including our annual *Salary Guide*. Plus you get a direct connection to skilled accounting and financial professionals to help with all your staffing needs, from accounts payable and collections to staff accountants and controllers.

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Thank you, Robert Half, for all you do to promote women in accounting!!



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