



the AFWA Seattle Journal

Volume 65 Issue 1

July 2013

In This Month's Newsletter

[Dinner Meeting Program](#)

[Announcements & Calendar
of Events](#)

July 24, 2013 Dinner Meeting Information

Location:

Rainier Golf & Country Club
11133 Des Moines Memorial
Drive South
Seattle, WA 98168
Dress Policy: No Jeans Please

Agenda:

5:30-6:30
Social Hour & Networking
6:30-7:30
Dinner & Announcements
7:30
Speaker
8:30
Adjourn

Menu:

Entrée: Grilled King Salmon
Vegetarian Entrée: Stuffed
Pasta Shells Florentine
Dessert: Blueberry-Peach
Crisp

July Dinner Meeting:

Wednesday, July 24, 2013

Speaker:

Bridget Burgess, CFP

Topic:

Matching Investments with Goals

The July topic will be a discussion of the various types of investments and how the typical returns per asset category should match short term, med term and long term goals.

A Certified Financial Planner, Bridget Burgess is also a licensed broker, insurance agent, and investment advisor. She has been in the investments and insurance industry 30 years serving on non-profit boards and working for insurance companies, banks, and broker dealers before starting her own practice. Her last stint in

Reservation Deadline:
Please make your reservation no later than 5pm on Thursday, July 18, 2013.
NO reservations after the deadline please - we have to give a firm count to catering.

We are charged for all meals reserved, therefore cancellations must be received no later than noon on the Monday before the meeting. No-shows and late cancellations will be billed.

[Click here to make your secure reservation online using our new Formstack account](#)

--- If you need to get a message to the Arrangements Committee, 3 options:
1) use the message field in the online res form

2) email:
reservations@aswaseattle.org

3) leave voicemail on the voicemail line at 206-467-8645

--- Save time and \$1 every month - sign up for a **STANDING RESERVATION** and just go!

Quick Links

[Our Website](#)

[Calendar of Events](#)

[Employment Opportunities Newsletter](#)

[AFWA Volunteer Opportunities](#)

[New Secure Online Reservation Form \(using Formstack\)](#)

the corporate world was for 13 years as President of the retail securities brokerage firm, Safeco Investment Services, Inc. (SIS).

[Click here](#) to make your reservation and to pay online using our secure Formstack account. Also please check out the additional dinner meeting info below.

CPE Info:

- Program level: Basic
- Program prerequisites: None
- Instructor delivery method: Traditional
- Recommended amount of CPE credit: 1

AFWA is 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 4th Avenue North, Suite 700, Nashville, TN, 37219-2417.

Announcements

Volunteers Wanted - We Need You

As we get started on the new fiscal year, the new Board of Directors is in place and new committee chairs are taking over and they need help. The following committees need committee members: Program, Arrangements, Membership, Student Activities, Technology, Website.

Working on a committee is one of the best ways to make the most of your AFWA membership. It allows you to contribute to the goals of the Seattle chapter, to get to know your fellow members and how the chapter operates, and to gain and enhance skills valuable to you in your career and to your employer.

So, pick a committee or an area that interests you and contact the committee chair to get involved. You will find the officer and committee chair roster on the website. If you are not sure what committee to get involved with or how much time you have to commit, contact a board member to explore the options or come to the next dinner meeting to meet the committee chairs.

WE need YOU to help the Seattle chapter remain strong and vital. Please get involved.

Calendar of Events:

2013:

Aug. 28 - August Dinner Meeting, Joint with Bellevue Chapter - in Seattle

Topic: Legal Aspects of a High Tech Start-Up

Speaker: Madhu Singh, JD

Contact Us

To join for the first time or add a second email, click this button.

Join Our Mailing List!

To change your email address in the AFWA Seattle mailing list, go to "Update Profile/Email Address" at the bottom of this email.

This will not change your email address with AFWA National.

To change that as well, log in to National's eDirectory at www.afwa.org to edit your profile.

Sept. 25 - September Dinner Meeting - Scholarship Dessert Auction

Oct. 20-23 - AFWA Annual Conference in Indianapolis

Oct. 23 - October Dinner Meeting

Nov. 7 - IRS Working Together Symposium

Dec. 13 - AFWA/Seattle University Fall Tax Seminar

Other Dinner Meeting Information:

Reservations must be made no later than 5pm on Thursday, July 18, 2013. You will receive an acknowledgement when your reservation is received. You can also sign up for the convenience of a Standing Reservation at any time (and save a dollar).

We are charged for all reserved meals, therefore no-shows, which includes anyone with a Standing Reservation, will be billed.

To avoid this, you must cancel your reservation no later than noon the Monday before the dinner meeting by calling 206-467-8645 or by emailing reservations@aswaseattle.org. The complete reservation and cancellation policy is on the online form.