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FastFact: Human Resources, Edition 83, October 13, 1998

American Institute of Certified Public Accountants (AICPA)

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Edition 83

October 13, 1998

WELCOME ABOARD!

Please join us in welcoming the following new Team members who started at the Institute between September 30, 1998 and October 13, 1998:

Ritu Arora: Direct Marketing Analyst, Marketing Services (Team #009) ext.3577. Ritu comes to the Institute from MLH, Inc. where she was a Database Analyst.

Lisa Cook: Member Satisfaction Representative, Member Satisfaction (Team #080) ext. 3136. Before joining Team AICPA, Lisa was a Customer Service Representative for National Telecommunications.

Tyronnette Nimmons: Member Satisfaction Representative, Member Satisfaction (Team # 080) ext. 3575. Tyronnette was a Customer Service Representative with National Telecommunications before joining the Institute.

Irina Rinskaya: Sr. Programmer Analyst, Information Systems (Team #065) ext. 3826. Irina comes to Team AICPA from the New York State Society of CPAs where she was a Programmer Analyst.

PROMOTIONS/TRANSFERS

The following employees were recently promoted and/or transferred to new positions:

Deborah Haskins: has transferred and been promoted to Sales Support Assistant, Direct Sales (Team 050) from Administrative Secretary in Exams (Team #044).

Erin Mackler: has transferred to Technical Manager, Technical Services (Team #033).

Much success in your new assignments!

RESTRUCTURING OF TEAMS: Update

The following provides more details on the recent restructuring of teams as outlined in the September 11, 1998 memo from Barry Melancon.

Reporting to Jay Rothberg:

| Employees | New Team Name |
|--------------------------------|--|
| Ron Hynek Jennie Bartilucci | #083 will now be known as <i>Member Satisfaction—Fulfillment</i> |

| Employees | Old Team | New Team & Name |
|---|----------|--|
| Emma Carlson Theresa Caro Julia Ray | #067 | #025 will now be known as <i>Member Satisfaction—Group Study</i> |

Also reporting to Jay Rothberg: Team #013—Meetings & Travel, and Team #068—Distribution Services.

Reporting to Peter Tuohy

| Employees | Old Team | New Team |
|--|----------|-------------------------|
| David Morgan Gregorio Espinal Porfirio Pasia Chris Pinnock Obiri Twum-Barima | #067 | #066: Printing Services |

| Employees | New Team & Name |
|---|--|
| Scott Cheney Maria LaBranche Francisco Pacheco Ed Lanigan (transf. from #043) Irene Lackner (transf. from #043) Linda Robinson (transf. from #043) | #067 will now be known as <i>Production Scheduling</i> |

In addition, Library Services--Team #028, will now report to John Hudson; Records Management--Team #063, will now report to Irene Kassimis.

SPECIAL SCHWAB INFORMATION PAGE

SIGN UP NOW FOR SCHWAB SEMINARS

As announced in the September 29, 1998 edition of *FastFact*, the HR Team will be holding Schwab investment education seminars in all three offices during the months of October and November. Below are the dates and times when Schwab seminars will be offered in each office. If meeting rooms are not noted below, they will be announced in a future edition of *FastFact*. Seminar descriptions follow the list of dates and times.

Important note: If you would like to participate in any of the seminars offered below, please RSVP to Kim Hines in Human Resources for the NJ & NY offices, or to Ela Work in the DC office. Please be sure to specify in your e-mail which seminar, at which office, and at which time. Space is limited.

Schwab Seminar Offerings—By Office Location

New York Office

Monday, October 19

9:30am – 12:30pm:
1:30pm – 3:00pm:
3:30pm – 4:30pm:

Location: TBA
Smart Steps to Maximizing Your 401(k)
Smart Steps to Mutual Fund Investing
More IRAs, More Choices – New Roth IRA Seminar

New Jersey Office

Tuesday, October 20

10am – 11am:
1:00pm – 2:30pm:
3:00pm – 4:30pm:

Location: Training Room C
Enrollment Meeting
Smart Steps to Retirement Planning
Smart Steps to Mutual Fund Investing

| | |
|------------------------------|--|
| <u>Wednesday, October 21</u> | Location: Training Room C |
| 9:30am – 12:30pm: | Smart Steps to Maximizing Your 401(k) |
| 2:00pm – 3:00pm: | Web Demonstration |
| <u>Thursday, October 22</u> | Location: Training Room C |
| 9:30am – 12:30pm: | Smart Steps to Maximizing Your 401(k) |
| 1:30pm – 3:00pm: | Smart Steps to Investing |
| 3:30pm – 4:30pm: | More IRAs, More Choices – New Roth IRA Seminar |
| <u>Friday, October 23</u> | Location: Training Room C |
| 9:30am – 11:00am: | Smart Steps to Mutual Fund Investing |
| 12:30pm – 2:00pm: | Smart Steps to Retirement Planning |
| <u>Monday, November 9</u> | Location: Training Room C |
| 9:30am – 12:30pm: | Smart Steps to Maximizing Your 401(k) |
| 1:00pm – 2:00pm: | More IRAs, More Choices – New Roth IRA Seminar |
| 3:00pm – 4:30pm: | Smart Steps to Retirement Planning |
| <u>Tuesday, November 10</u> | Location: Training Room C |
| 10:00am – 11:00am: | Enrollment Meeting |
| 2:00pm – 3:30pm: | Smart Steps to Mutual Fund Investing |

DC Office

| | |
|-------------------------------|---------------------------------------|
| <u>Wednesday, November 11</u> | Location: TBA |
| 9:30am – 12:30pm: | Smart Steps to Maximizing Your 401(k) |
| 1:00pm – 2:30pm: | Smart Steps to Mutual Fund Investing |
| 3:00pm – 4:30pm: | Smart Steps to Retirement Planning |

Schwab Seminar Descriptions

Enrollment Meeting (1 hour): For those who are not yet enrolled in the AICPA's 401(k) plan for employees. This seminar will provide an overview of the Schwab 401(k) plan available to all eligible employees. All are welcome to attend—those who are not enrolled will be receiving a special invitation in the mail to attend this particular seminar.

New! Roth IRAs (1 hour): Concentrates on the features, benefits, and implications of using a Roth IRA to create a nest egg for retirement.

Smart Steps to Investing (1 ½ hrs): The basics of investing. Presents the pros and cons of the different types of investments: stocks, fixed-income securities and mutual funds. Will also help you define your financial goals, choose an investment plan and put that plan into action.

Smart Steps to Maximizing Your 401 (k) (3 hrs): To help you make more informed decisions about how to save for retirement, and how to allocate your savings across investments in order to balance risk with reward.

Smart Steps to Mutual Fund Investing (1 ½ hrs): The basics of mutual fund investing. Demonstrates how to choose the mutual funds that may best suit your needs based on your risk tolerance and time frame.

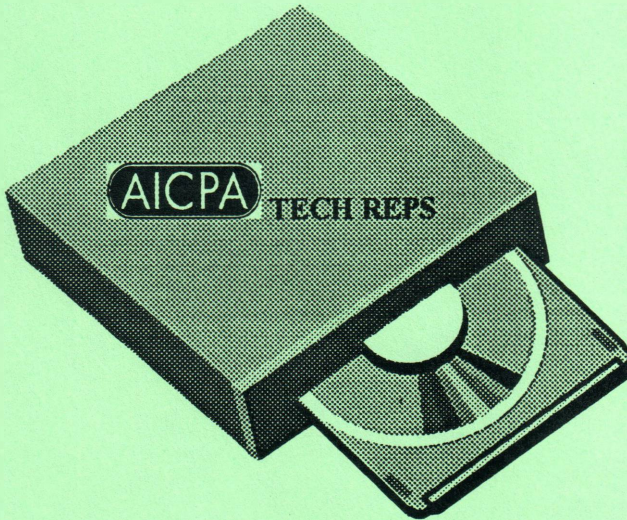
Smart Steps to Retirement Planning (1 ½ hrs): Guidelines you'll need to define your retirement goals. Demonstrates how to use the investments offered through Schwab to plan for a secure financial future.

New! Web Demonstration (1 hour): This seminar is designed to teach participants how to access the SchwabPlan™ Website to keep track of their Schwab account. In addition, the different sources of information and investment assistance available on the World Wide Web will be demonstrated.

OUR QUALITY POLICY STATEMENT IS

“AICPA MEETING TODAY'S CHALLENGES, EXCEEDING TOMORROW'S EXPECTATIONS”

TECH REPS ON THE MOVE!



- Identifying additional training needs.
- Acting as a liaison between day-to-day teams, MIS/PC Support Help Desk and the Technology Advisory Team.
- Participating in the rollout of new software and hardware.
- Recommending new technology needs to MIS.

Currently, the Tech Reps are testing a new client for cc:Mail, and are being encouraged to seek Microsoft certification for Word and Excel.

Both MIS and the Technology Advisory Team are confident that this new program will benefit Team AICPA with the increasing need to expand all team members' technology skills as we move forward as a world-class organization.

If you have any questions, please do not hesitate to call your Tech Rep or any member of the Technology Advisory Team.

Please note: If your team does not yet have a Tech Rep assigned, and you are interested in becoming your team's Tech Rep, please contact your team leader. That team leader should then contact Irene Taylor at x3305 for further information.

The Technology Advisory Team is pleased to announce the inauguration of the Technical Representative ("Tech Rep") Program. A Tech Rep is a member of your day-to-day team who has been selected by your day-to-day team leader to proactively assist, communicate and act as a liaison between the day-to-day teams, MIS and the Technology Advisory Team. A list of each day-to-day team's Tech Rep can be found on the following two pages.

The responsibilities of the Tech Rep include:

- Promoting the use of technology and sharing of knowledge.
- Coaching the day-to-day teams on the use of software, including tips and techniques.

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TECH REPS

| Team # | Team Name | Tech Rep | Team # | Team Name | Tech Rep |
|--------|---|---|--------|--|-----------------------------------|
| 001 | President & CEO - NY | Luz Perez | 029 | Personal Financial Planning | Dan Miola |
| 003 | General Counsel & Secretary - NY | Luz Perez | 030 | Technical Hotline - NY | Wendy Hall |
| 004 | Human Resources | Selmo Alamilla | 031 | Professional Standards & Services - NY | Louis Cabrera |
| 005 | Internal Audit/Quality Control | George Durk | 032 | Mgmt. Consulting Services - NY | Barbara Hauser |
| 006 | Marketing & Product Management | Ed Rose | 034 | Accounting Standards - NY | Mark Simon |
| 007 | Marketing, Prod. & Org. Dev. | Ed Rose | 035 | Professional Publications | Lianne Morales |
| 008 | TIPS | Irene Shubov | 036 | PCPS/MAP | Barbara Vigilante/ Cay Mathews |
| 010 | Public Relations/Communications - NY/DC | Vicki Majewski (DC)/ Maritza Cora (NY) | 038 | Microcomputer/LAN Support | Help Desk |
| 013 | Meetings & Travel | Patrina Wright/ Samantha Bowerman | 039 | On-line Services | (Tech Rep needed) |
| 016 | Technical Publications | Peggie Burns | 040 | Professional Ethics | Brenda Rivera |
| 017 | Tax Adviser | Nick Fiore | 041 | Financial Analysis & Budget | Millie DeJesus |
| 018 | Congressional & Political Affairs - DC | Vicki Majewski | 042 | Dues Accounting | Rose DellaBovie |
| 019 | State Societies & Reg. Affairs - DC | William Rose | 043 | Production - Periodicals | Gene Cioffi |
| 020 | Taxation - DC | Carlotta Stewart | 044 | Examinations | Ed Lake & Ina Walker |
| 021 | Prof. Stndrds. & Svcs.—Reg. Svcs. | Lysa Phillips | 045 | Financial Management | Millie DeJesus |
| 022 | Auditing Standards - NY | Sherry Boothe | 046 | Academic & Career Development- NY | Marlene Gallagher |
| 023 | Practice Monitoring | Sheri Fabian | 047 | Magazines & Newsletters | Richard Koreto |
| 024 | Industry & Mgmt. Accounting - NY | Pam Green | 048 | <i>Journal of Accountancy</i> | Richard Koreto |
| 026 | Prof. Dev. - Acctg. & Auditing | Wilma Thomas | 049 | Production - Professional Pubs. | Bob DiCorcia |
| 027 | Audit & Accounting Guides | Shirley Senior | 051 | Marketing Services | Jim Catone |
| 028 | Library Services | Gus Garcia | 052 | Payroll | Carol Fagan |



TECH REPS

| Team # | Team Name | Tech Rep | Team # | Team Name | Tech Rep |
|--------|---------------------------------------|--|--------|--|------------------------------------|
| 053 | General Accounting | Stephanie Panzariello/ Holly LoCascio | 081 | Operations & Information Technology | Jennifer Kurylka/ Fina Kaminski |
| 055 | Accounts Receivable | Larry Millares | 083 | Fulfillment & Office Services | Jennifer Kurylka |
| 057 | Software Development | (Tech Rep needed) | 084 | Facilities Management | Jennifer Kurylka |
| 058 | Finance | Millie DeJesus | 086 | Conferences – Rev. Producing | Wilma Thomas |
| 059 | Credit & Collections | Millie DeJesus | 091 | Conferences – Member Services | Wilma Thomas |
| 060 | Information Operations | Fina Kaminski | 092 | Professional Dev. – Admin. | Wilma Thomas |
| 061 | Telecommunications | Tony Nunez/ John Scott | 093 | Prof. Dev. – Tax. & Technology | Wilma Thomas |
| 062 | Graphic Design Services | Cheryl Bradford | 094 | Prof. Dev. – Quality Assurance | Wilma Thomas |
| 063 | Records Management | Jennifer Kurylka | 097 | Beta Alpha Psi - NY | Zoe Cheung |
| 064 | Purchasing | Gloria Rivera | 340 | ISB | Susan Lange |
| 065 | Information Systems | Fina Kaminski | | | |
| 066 | Printing Services | Karen Zimmerman | | | |
| 067 | Materials Assembly & Distribution | (Tech Rep needed) | | | |
| 068 | Distribution Services | (Tech Rep needed) | | | |
| 070 | Facilities Management – NY | Tracey Argenzio | | | |
| 073 | Professional Development – Production | Aida Salom | | | |
| 075 | Prof. Dev. – Industry & Cnsltg. Svcs. | Wilma Thomas | | | |
| 076 | Information Technology – NY | Gaby Ulloa | | | |
| 079 | Prof. Dev. – Educ. Supp. Svcs. | Wilma Thomas | | | |
| 080 | Member Satisfaction | Walling Almonte/ Kim Citro | | | |

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|--------------------------------|--|
| Technical Advisory Team | Irene Taylor, Michele Lombardo, Gregory Johnson, David Ray, Tom Lemmon, Selmo Alamilla, Samatha Bowerman, Frimette Kass, and Cris Wight |
|--------------------------------|--|