

From the Ozarks



# The Ozarks Ledger



Ozarks Chapter  
Volume V, Issue 3  
March 6, 2009

We're on the Web at  
[www.ozarksaga.org](http://www.ozarksaga.org)

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## President's Message



WOW! Time flies when you are having fun. I hope not all of you have had as much fun as those of us over at the city. Between budget crunch and a computer virus I personally have had all the fun I can handle. And believe me the deadlines just keep coming, so time really did fly by.



Deb Gillenwaters, CGFM

March brings us many things including the promise of Spring right around the corner. We lose an hour to day light savings time, but on the up side we have a lot more hours of sunlight with more every day.

So shake out the winter cob webs and come join us on Saint Patrick's Day for six hours of CPE. We are trying something new this year in our continuing effort to provide quality CPE at the lowest possible cost. Because we are able to get a cost free venue and have quality speakers available the March seminar the chapter has put together is a tremendous value. Included in one price we are offering to pay this year's national and chapter dues, lunch, snacks, and six hours of CPE, including two hours of ethics. It is your own personal pot of gold at the end of the rainbow.

New members will complete application forms at the meeting. Renewing members need to send their renewal forms in with their registration forms or at the latest turn them in at the seminar. More information about the March 17<sup>th</sup> seminar can be found in this newsletter.

The slate of officers that have agreed to serve our chapter next year will be presented at the meeting. We will also be presenting a motion to grant stipends to two officers willing

to attend the Professional Development Conference each year. National AGA provides a lodging scholarship for two members from the chapter each year. That scholarship combined with a stipend would make it easier for us to send two officers to represent us at PDC.

At the February 28<sup>th</sup> retreat we finished reviewing and updating the chapter by-laws, whew! At a later date those will be presented to you for review and ratification.

Another opportunity that we have not taken full advantage of in years past is the all expenses paid Sectional Leadership Meeting or SLM that four members of the Chapter Executive Committee are allowed to attend each year. Last year Teresa Allen and I attended and came back energized and hopeful. This year four individuals have volunteered their time to attend in Denver and I am certain will bring back lots of good information to make the coming chapter year one that will benefit us all.

*President's Message continued from page 1*

In April we will not be having our regular meeting. Rather another great opportunity for CPE has been made available in conjunction with ASWA and IMA. If you have not heard Bill Jelen (Mr. EXCEL) speak, this seminar is an excellent time to learn more about Excel than you knew existed. You come away from his class

with one the most useful texts you will have on your desk. Dr Rod Oglesby will also be speaking at this event. Anyone that has heard him speak can tell you it is well worth your time and resources. Teresa Allen has worked with IMA and ASWA to help put this seminar together, please consider attending and boosting your CPE count. I will be there and hope to see you.

## Chapter Executive Committee Minutes Feb 17, 2009

The Ozarks Chapter of AGA held a board meeting on February 17, 2009 in the conference room of Springfield-Greene Health department.

The items discussed were:

- ◆ Martha Mundt, the Ozarks Chapter's temporary Treasurer, related her concerns about the internal control policies of the Postal Federal Credit Union, which is the Ozarks Chapter's current bank institution. A new banking facility is being considered.
- ◆ The discussion on Share Point, a new communication website being offered by the City of Springfield, was tabled at this time.
- ◆ Four board members, Sally Payne (Membership), Julie Vaughan, Teresa Allen (President-Elect) and Martha Mundt (Education), volunteered to attend the PDC in Denver, Colorado on April 30th.
- ◆ A brunch will be served at the officers' retreat on Saturday, February 28, 2009 at the home of President-Elect Teresa Allen from 10 a.m. to 2 p.m. The agenda items will be completion of the by-laws, and speakers & strategies for the upcoming year.
- ◆ A preview of the next three month's events:  
A spring seminar will be held at Cooper Tennis on March 17, 2009. Dr. Jim Lampe from MSU will present Ethics from 9 – 11; Anita Santiago from the US Dept. of Commerce will discuss the CGFM from 11-12; Angela Morelock from BKD will talk about Careers in Forensic Accounting from 1-3; Kyle Brice from IRS will discuss IRS investigations from 3-4. An invitation has been sent to the SW Baptist, Drury and MSU's students to attend the seminar at no cost. Lunch will be provided from McAlister's to paid attendees. All attendees will be served snacks and cookies during the two breaks.

**Seminar Chairs are:**

Venue/Support --	Teresa Allen/Deb Gillenwaters
Speakers Intro/Gifts --	Deb Gillenwaters
Forms/Cookie Purveyor--	Deb Fraley
Registration --	Sally Payne/Deb Gillenwaters
Food --	Martha Mundt/Deb Gillenwaters
Registration Table --	Justin Hill/Linda Charles

- ◆ The Institute of Management Accountants, in conjunction with ASWA & AGA will present their Spring Professional Development Seminar at Oasis Hotel and Convention Center on April 22. The speakers will be Dr Rod Oglesby and Bill Jelen, (Mr. Excel).
- ◆ Ideas on future speakers are needed for May & June 2009. Linda Charles and Deb Gillenwaters asked Justin Hill to contact Rick Kessinger, Greene County Assessor about speaking at an Ozarks AGA meeting. Martha Mundt suggested finding a speaker who would present new GASB statements. Another speaker could be Dan Wichmer who could present the updated status on the Sunshine Law.

The proposed slate of Chapter officers for 2009-10 are:

President --	Teresa Allen
President-Elect --	not selected
Secretary --	Julie Vaughan
Treasurer --	Bob Wells
Membership --	Sally Payne
Education --	Martha Mundt
Communications --	Linda Charles
Newsletter --	Deb Fraley
Chapter Recognition--	Justin Hill

Teresa Allen and Martha Mundt will be attending the PDC in New Orleans on June 21<sup>st</sup> through 24<sup>th</sup>.

The board members present were Deb Gillenwaters, Teresa Allen, Sally Payne, Jerry Mitchell, Deb Fraley, Julie Vaughan, Martha Mundt and Linda Charles.

Submitted by,  
Linda Charles, Chapter Secretary

# Register Now for the PDC in New Orleans

## Registration and Hotel Rooms Now Open for AGA's PDC in New Orleans

Join us in the "Big Easy" **June 21-24, 2009**, for AGA's 58th Annual Professional Development Conference & Exposition (PDC)--*the* premier education and networking event of the year!

At the PDC, you can hear from dynamic speakers, make new contacts, learn about the latest research, discover innovative management techniques and see the technological tools that can aid efficiency and improve effectiveness.

In addition to an excellent technical education program, the PDC is packed with opportunities to network with colleagues from around the country and make new friends. While you're here, please be sure to experience all the music, culture, history and fine dining New Orleans has to offer.

<http://www.agacqfm.org/pdc2009/index.htm>

## Hotel Accommodations:

This year's conference activities will take place at two hotels, the Marriott New Orleans and the Sheraton New Orleans Hotel. For your convenience, both hotels are located on Canal Street and are directly across the street from each other.

We have reserved a block of rooms at the New Orleans Marriott and the Sheraton New Orleans Hotel to accommodate PDC attendees. The AGA room rate is \$120 per night (plus tax) for single and double occupancy. Rates are only guaranteed until **May 29**, or until *the block is sold out*. We encourage you to make your hotel reservations early, for the best price and availability.

To make a reservation, please call your preferred hotel at **800.228.9290** (Marriott) or 888.627.7033 (Sheraton) and mention you are attending the "AGA PDC" to receive the discounted rate.



# Future Ozarks Chapter Educational Events

Month	Date	Description	Location
March 	3/10/2009	Spring Membership Seminar	Cooper Tennis Complex
April	04/22/2009	Greater Ozarks IMA Seminar Co-sponsored by Ozarks AGA and Springfield ASWA	Ramada Oasis Hotel and Convention Center
May	TBA	TBA	TBA
June	TBA	TBA	TBA



**SPRING MEMBERSHIP SEMINAR  
COOPER TENNIS COMPLEX ATRIUM ROOM  
2331 E. PYTHIAN  
SPRINGFIELD, MISSOURI  
TUESDAY, MARCH 17<sup>TH</sup>, 2009  
REGISTRATION FORM**

NAME	
EMPLOYER	
JOB POSITION/TITLE	
WORK PHONE	
EMAIL	

**The registration fee of \$120 includes your AGA membership dues for 2009**

**Current members: Please enclose your membership renewal form with your registration. There will be membership forms available at the seminar for those who are not yet members.**

\_\_\_ Yes, I would like a box lunch (McCalister's lunch included in registration fee)

Roast Beef

Turkey

Tuna

**Please make checks payable to Ozarks Chapter of AGA  
Check-in opens at 8:30 AM, the seminar starts at 9:00 AM**

**Return by March 10th to:**

Deb Gillenwaters  
Greene County Health Department  
227 E Chestnut Expressway  
Springfield, MO 65802

Email: [dgillenwaters@springfieldmo.gov](mailto:dgillenwaters@springfieldmo.gov)

Fax: 417-864-2065

Phone: 417-864-1896

# AutoFilter a Pivot Table?



by Bill Jelen – MrExcel

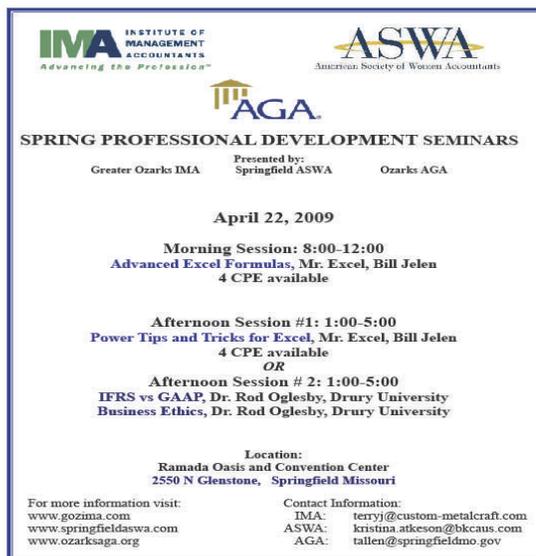
Try it – when you are inside a pivot table, the AutoFilter selection is grayed out. Too bad if you want to filter the results to see customers between \$50 and \$75K – the AutoFilter simply doesn't work in the pivot table.

Ready to be amazed? Say that row 4 of your pivot table contains headings for Customer, Sum of Quantity, Sum of Revenue, and Sum of Profit. Move the cell pointer directly to the right of the last heading. This is the first cell outside of the pivot table. Hold down the shift key while pressing the left arrow key to move backwards to cell A4. You've now selected the range E4:A4 and the active cell is E4. Because the Active Cell is not inside the pivot table, Microsoft forgets to disable the AutoFilter! Choose Data, Filter, AutoFilter and Excel will turn on the AutoFilter dropdowns in your pivot table.

To see customers with revenue between \$50-\$75K, open the Sum of Revenue dropdown and choose (Custom). In the Custom AutoFilter dialog choose is greater than or equal to 50,000 and is less than or equal to 75,000.

Since Microsoft did not expect you to be able to filter a pivot table, they do not recalculate the filter when you refresh the pivot table. You should only use the AutoFilter trick when you've reached the final pivot table.

Bill Jelen is the author of the upcoming book, *Excel Gurus Gone Wild*, with dozens more amazing tricks like this one. Hear Bill and get a free copy of the book by attending the *IMA Professional Development Seminar April 22, 2009 at Missouri State University*. More info on the PD to follow soon.





  
**AGA**
  
**SPRING PROFESSIONAL DEVELOPMENT SEMINARS**
  
 Presented by:
   
 Greater Ozarks IMA      Springfield ASWA      Ozarks AGA
   
**April 22, 2009**
  
**Morning Session: 8:00-12:00**
  
**Advanced Excel Formulas, Mr. Excel, Bill Jelen**
  
 4 CPE available
   
**Afternoon Session #1: 1:00-5:00**
  
**Power Tips and Tricks for Excel, Mr. Excel, Bill Jelen**
  
 4 CPE available
   
 OR
   
**Afternoon Session # 2: 1:00-5:00**
  
**IFRS vs GAAP, Dr. Rod Oglesby, Drury University**
  
**Business Ethics, Dr. Rod Oglesby, Drury University**
  
**Location:**
  
 Ramada Oasis and Convention Center
   
 2550 N Glenstone, Springfield Missouri
   
 For more information visit:
   
 www.gozima.com      IMA: terryj@custom-metalcraft.com
   
 www.springfieldaswa.com      ASWA: kristina.atkeson@bkccaus.com
   
 www.ozarksaga.org      AGA: tallen@springfieldmo.gov

## Tax Provisions in the American Recovery and Reinvestment Act of 2009

Congress has approved and the President has signed new economic stimulus legislation, the American Recovery and Reinvestment Act of 2009. The IRS is implementing tax-related provisions of this new program as quickly as possible.

Here are some key highlights:

- Payroll Checks Increase This Spring. The Making Work Pay Tax Credit will mean \$400 to \$800 for many Americans. The IRS has issued new withholding tables for employers.
- \$250 for Social Security Recipients, Veterans and Railroad Retirees. The Economic Recovery Payment will be paid by the Social Security Administration, Department of Veterans Affairs and the Railroad Retirement Board.
- Money Back for New Vehicle Purchases. Taxpayers who buy certain new vehicles in 2009 can deduct the state and local sales taxes they paid.

Information on other provisions of the stimulus law will be available on this Web site, [IRS.gov](http://www.irs.gov), as they become available.

### Common questions answered on individual and business Tax provisions of economic-stimulus package:

The AICPA has prepared a [Q&A](#) on individual and business tax-related provisions in the American Recovery and Reinvestment Act of 2009. CPAs, especially tax practitioners, will find the Q&A helpful in addressing client or employer inquiries. Among the subjects covered for individuals are the first-time home-buyer credit, college-funding tax credit, unemployment benefits, benefit for use of public transit and the alternative minimum tax exemption. For businesses, the Q&A highlights depreciation, expensing, capital gains, work opportunity credit and penalty relief from underestimating taxes.

[http://www.aicpa.org/download/news/2009/FAQs\\_about\\_ARRA\\_2009.pdf](http://www.aicpa.org/download/news/2009/FAQs_about_ARRA_2009.pdf)



### TREASURER'S REPORT

December 2008 - February 2009 Activity

	November 30, 2008		8,585.30
	Receipts:	Tower Club - Dec	144.00
		Tower Club - Jan	216.00
		Tower Club - Feb	252.00
		Fall Seminar	80.00
		CPA Day Seminar	100.00
		Nov Audio Conf	10.00
	<b>Total Receipts</b>		<b>802.00</b>
	Disbursements:	CPA Day	(75.41)
		Tower Club - Dec	(487.36)
		Tower Club - Jan	(406.91)
		Tower Club - Feb	(339.71)
		Weller School - Donation	(2500.00)
		Panera G.C. Door Prizes	(30.00)
	<b>Total Disbursements:</b>		<b>(3,839.39)</b>
			<b>5,547.91</b>
	Bank Stmt Cking Acct Balance	5,610.62	
	Outstanding Checks	-	
	Outstanding Deposit	252.00	
	Savings Acct Balance	25.00	
	<b>Total Cash in Bank</b>		<b>5,887.62</b>



Happy Birthday to all  
those celebrating in  
March

# Your 2008-2009 Ozarks Chapter of AGA Officers

President	Deb Gillenwaters, CGFM	Ph: 417-864-1896 Fx: 417-864-2065	dgillenwaters@springfieldmo.gov
President-Elect	Teresa Allen, CGFM	Ph: 417-864-1337 Fx: 417-837-5811	tallen@springfieldmo.gov
Secretary	Linda Charles	Ph: 417-864-1864 Fx: 417-864-1880	lcharles@springfieldmo.gov
Treasurer	Martha Mundt, CGFM	Ph: 417-864-1631	mmundt@springfieldmo.gov
Past President	Jerry Mitchell, CGFM, CPA	Ph: 417-864-1325 Fx: 417-837-5811	jmitchell@springfieldmo.gov

## Board Members

Dir. of Education	Martha Mundt, CGFM	Ph: 417-864-1631 Fx: 417-864-1880	mmundt@springfieldmo.gov
Dir. of Membership & Chapter Recognition	Justin Hill	Ph: 417-829-6202	jrhill@greencountymo.org
Dir. Of Professional	Deb Gillenwaters, CGFM	Ph: 417-864-1896	dgillenwaters@springfieldmo.gov
Newsletter Editor	Deb Fraley, CPA	Ph: 417-864-1903 Fx: 417-864-1929	dfraley@springfieldmo.gov
Webmaster	Linda Charles	Ph: 417-864-1864 Fx: 417-864-1880	lcharles@springfieldmo.gov



ASSOCIATION OF GOVERNMENT ACCOUNTANTS,  
OZARKS CHAPTER



c/o Greene County Auditor  
940 Boonville Ave., Rm 210  
Springfield, MO 65802

We're on the Web at:  
OzarksAGA.org



*Ozarks Chapter of The Association of Government Accountants*  
*Deb Fraley, CPA, Editor*  
*Deadline for articles: Monday-eight days prior to meeting date*  
*Send articles to: [dfraley@springfieldmo.gov](mailto:dfraley@springfieldmo.gov)*