



New Year Wishes from Your WI-AAM Board

Happy New Year! As we begin 2012, the WI-AAM Board continues to work hard to bring you valuable programming and resources. You will notice a few changes this year. This email is the first of monthly bulletins that WI-AAM will be sending to you. Content will include updates from AAM National, AAM National Discussion Summaries (more information below), details about upcoming events and any other updates on issues affecting the accounting world.

In this first issue, the board would like to take a minute to introduce themselves and provide you with a New Year's wish:

- **Katie Austing**, WI-AAM President, Senior Marketing Coordinator at Kolb+Co.
I wish you contact clarity – may your databases have top-notch input, seamless list-running and quality output.
- **Becky Bauer**, WI-AAM Past President, Division Marketing Director at CliftonLarsonAllen
For all marketers - A budget to support the exploration of new social and mobile marketing strategies at your firms.
- **Michelle Meier**, WI-AAM Vice President of Communications, Marketing Director at Winter, Kloman, Moter & Repp, S.C.
For all marketers – The motivation and partner support to think outside the box, and recognize the power of new opportunities to integrate into your marketing mix.
- **Dave Merk**, WI-AAM Vice President of Membership, Senior Account Executive at The Business Journal
May you have harmony and singular focus for marketing and sales plans and execution.
- **Kerri Nowicki**, WI-AAM Treasurer, Director of Marketing at Kolb+Co.
May we all find ways to elevate our value to our firms through circulating news on clients to service teams, identifying tools that leverage technology and provide efficiencies, assessing and re-engineering processes within our departments, and implementing other improvement initiatives.

SEMINAR

Health Care Reform - How You and Your Clients Should Prepare.

Speaker: John A. Rubatt, Senior Vice President, Employee Benefit Group at Willis

Thursday, February 16, 2012

11:30 a.m. – 12:00 p.m.: Welcome, Registration and Lunch

12:00 p.m. – 1:00 p.m.: Program

Kolb+Co.

13400 Bishop's Lane, Suite 300

Brookfield, WI 53005

[Directions](#)

\$25.00

Join the Wisconsin Chapter of AAM on [Thursday, February 16, 2012](#) as we welcome John A Rubatt, Senior Vice President, Employee Benefit Group at Willis. With all the confusion over healthcare reform and what's changing, it's hard to know what to expect. Learn what the Patient Protection and Affordable Care Act means and what your clients need to do to be prepared to manage and benefit from the change.

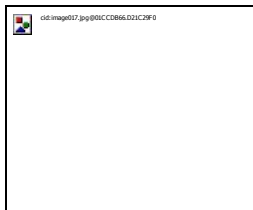
Discussion will include the following:

- What new obligations do employers have that make offering coverage more difficult?
- What new options do employees have that make it less important for employers to provide coverage?
- How will employers interact with the health insurance exchanges?

About AAM

The Association for Accounting Marketing (AAM) is a national-wide organization that provides resources and a network for accounting marketers. Your local chapter does the same by providing informational emails, educational seminars and networking with other accounting marketers. Membership in AAM National is not required to participate in your local chapter. In fact, the Wisconsin chapter of AAM does not charge membership fees!

- What health benefits can employers offer that are unique?
- What penalties will employers incur if they don't offer health coverage?
- Why do wellness initiatives and eligibility audits continue to gain ground?
- What new issues does health care reform present that employers should watch out for when negotiating employment and severance contracts?



John A Rubatt, joined Willis in 1996. He has over 33 years of Experience in the area of Employee Benefits. John holds a BBA with an emphasis in accounting and finance from the University of Wisconsin, Milwaukee. And he also holds a Fellow of the Life Management Institute (FLMI) designation.

At Willis, John provides consulting services to mid-market employers on their benefit programs.

RSVP

Please RSVP by **Monday, February 13, 2012** to [Michelle Meier](mailto:MichelleMeier@wkmr.com) at 262.797.9050 or MichelleM@wkmr.com. For further information or to join AAM, please visit the website at <http://www.accountingmarketing.org>.

Payment can be made upon arrival at the event via Check made out to WI-AAM or cash. Cancellation required at least 24 hours prior to the event. Any cancellations after that will be billed \$15 to cover pre-ordered food costs.

AAM Discussion Discussions

AAM National sends out weekly summaries of discussions being had by its members. This segment of our bulletin will highlight one (or more) of the conversations addressed by AAM members. You can also post and review discussions occurring on our local chapter's LinkedIn page – don't forget to join our [LinkedIn Group!](#)

Proposals, a topic that is near and dear to many of our hearts. Recently a discussion was started to gain new ideas and insights on what makes an effective proposal. The following outlines a few suggestions on how to create winning proposals:

I would encourage you to try and shift your professionals focus away from the proposals and more onto the pre-proposal activities like carefully selecting the engagement teams members based on trying to foster rapport with the decision-makers, proper research on the prospects and all that good stuff.

But you asked about PROPOSALS and I hear that! I would encourage that you try NOT to mimic anyone else's proposals – most accounting firm's proposals already look and read similarly – and, after all, your goal is to have this document help you to stand out from the crowd, right? Here is a great tip:

Start off with the accomplishments that you have for other clients just like them. Your first page could read "Experience and Resources Available to (insert company name). These should be bulleted, concise success stories that you have performed on behalf of your clients – see below:

- Worked with a start-up consumer finance company to produce compliant financial statements to attract investors, obtain financing, and raising additional equity; this company doubled its business in 3 years
- Facilitated an independent cost allocation study at the request of a regulatory agency on behalf of a Labor Union which satisfied the regulator, and resulted in the Labor Union avoiding fees estimated at \$5,000 (which would have been personally paid by the Officers of the Plan)

You should create and maintain a library of these accomplishments sorted by service and industry for use in proposals, brochures and bios. They can be re-ordered based on the specific needs/concerns of the prospective client.

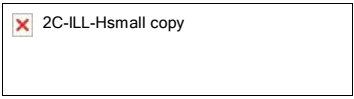
Starting off by answering the question, "What Can You Do for ME?" draws the reader of the proposal in – and will help your proposal stand out from your competitors.

Lisa Tierney
TIERNEY Coaching & Consulting
www.CPAMarketingConsultant.com

LisaTierney@comcast.net

Michelle M. Meier

Marketing Manager
[Winter, Kroman, Moter & Repp, S.C.](#)
235 North Executive Drive, Suite 160
Brookfield, WI 53005
Phone: 262-797-9050
Fax: 262-797-8251
MichelleM@wkmr.com
<http://www.linkedin.com/in/michellemeier1>



Notice: In order to comply with U.S. Treasury Circular 230, we are required to inform you that unless we have specifically stated to the contrary in writing, any advice we provide in this e-mail or any attachment concerning federal or state tax issues or submissions is not intended or written to be used, and cannot be used, to avoid federal and state tax penalties.

Confidentiality Notice:

This message is being sent by Winter, Kroman, Moter & Repp, SC.. It is intended exclusively for the individuals and entities to which it is addressed. This communication, including any attachments, may contain information that is proprietary, privileged, confidential, including information that is protected under the HIPAA privacy rules, or otherwise legally exempt from disclosure. If you are not the named addressee, you are not authorized to read, print, retain, copy or disseminate this message or any part of it. If you have received this message in error, please notify the sender immediately by email and delete all copies of this message. This message is protected by applicable legal privileges and is confidential.