PRESIDENT
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(484) 525-4690

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(615) 793-8582

SECOND VICE PRESIDENT
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(407) 581-3561

SECRETARY/TREAS.
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(256) 308-1721

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Muhammad Adam
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Muhammad.adam@floridasnatural.com
(863) 676-1411 Ext 3483

Alexa Bishop
Steph Chandler
Jennifer Schaal
Robbie Shields
Bryanna Fredericks

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Brian Kitchens
Alabama Farmers Cooperative

NATIONAL DIRECTOR
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DIRECTORS
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NATIONAL BOARD MEMBERS
Katrina Rote
David Antoni

AUDIT COMMITTEE
Danny Long
Tim Barber

TIME & PLACE & Activities COMMITTEE
Katrina Rote
Wendy Elliott
Alexa Bishop
Marc Zeff
Robbie Shields
Steph Chandler

PROGRAM & EDUCATION
Wendy Elliott
Katrina Rote
Bryanna Fredericks
Jill Baker
Dave Antoni
Marliss Carson
Andy Reading

ACTIVITIES COMMITTEE
Katrina Rote
Robbie Shields
Kelly Morgan
Bob Farmer

SOCIAL MEDIA COMMITTEE
Wendy Elliott
Alexa Bishop
Robbie Shields
Andy Reading

EARLY BIRD COMMITTEE
Joanna McClendon
Robbie Shields
Danny Long

PUBLICITY, PRINTING, & REGISTRATION
Andrea Gallagher
Robbie Shields
Mary Edwards
July 22, 2019

Chapter Membership:

What an exciting year this has been. We were able to cap it off with a wonderful annual meeting in Virginia Beach. For those of you who were able to attend, I’m sure you were impressed by the quality of speakers - they were able to put together relevant information that will help us in our daily lives. The networking activities tied it all together bringing us together as a one-chapter family.

And speaking of “one-chapter family”, it is now official! We had a few bumps and hurdles to cross, but we are now one united chapter - the new Atlantic chapter is the result of the merger of the South Atlantic and the Capitol chapters. As a consequence of this merger, our territory now extends the full length of the eastern coast and into Tennessee and Alabama. An extra special thank you to Todd Escelsen for all of his legal guidance and expertise that allowed us to get through this process.

As I complete my term as president, I think back to all the volunteers within our organization that made this such an enjoyable experience. We are lucky to have active committees who do a lot of the heavy lifting that is needed to take care of the duties of the chapter. Our biggest task is coordinating our annual meeting. I was amazed how many times I was worried that this needs to be done or that needs to be done only to find out that someone just stepped up and had taken care of it. There are a lot of angels within the organization the one I would like to give special thanks to is Mary Edwards, who has bailed us out year after year.

Included in this newsletter is a list of the 2019-20 directors and committees and their chairpersons. If you’re not on the committee and would like to be this upcoming season, please reach out to one of the board members so that we can get you involved. As you can see many of our members actively take part in the committees, but there is always room for more.

Our new president for this upcoming year is Bryanna Fredericks. Bryanna has been wonderful resource for me to lean on this last year and is well experienced, serving as the Capitol chapter president for the past three years. Congratulations to Bryanna and please provide her all the support that you have provided to me over this past year.

Dave Mereness, Past Chapter President
Articles of Interest!

Members:

If you should run into anything that you think might be of interest to our Members PLEASE forward it to me and I will try to get it in our Newsletter! Pictures, hobbies or just about anything that might be appealing to share and to add interest in this publication! I think humorous stories and recipes would be of interest. Hopefully everyone will benefit either professionally or simply be entertained! My email address is: Dlong@ourcoop.com.

Thanks, Danny Long

Please visit www.nsacoop.org and explore the many resources available to every member of NSAC.

Encourage your co-workers and peers to join our chapter. An application is enclosed within this newsletter and is available on the homepage of www.nsacoop.org.

Audit Report

June 25, 2019

Board of Directors
South Atlantic Chapter
National Society of Accountants for Cooperatives (NSAC)

We have examined the reconcilement of cash and disbursements of the South Atlantic Chapter – NSAC as of May 31, 2019, and the schedule of cash receipts and disbursements for the South Atlantic Chapter – NSAC. Our examination was made in accordance with generally accepted auditing standards and accordingly included such tests of the accounting records and such other auditing procedures, as we considered necessary in the circumstances.

The Chapter’s policy is to prepare its financial information on the cash method of accounting; consequently, revenue and the related assets are recognized when received rather than when earned, and expenses are recognized when paid rather than when the obligation is incurred.

In our opinion, the schedule referred to above present fairly the cash balance of the Chapter at May 31, 2019, and the cash receipts and disbursements of the Chapter on the basis of accounting described in the preceding paragraph, which basis has been applied in a consistent manner.

Daniel L. Long

Virginia Beach, Virginia
June 25, 2019
A meeting of the Atlantic Chapter (formerly South Atlantic and Capitol Chapters) of the National Society of Accountants for Cooperatives Board of Directors was held June 23, 2019 at the Sheraton Virginia Beach Oceanfront Hotel, Virginia Beach, Virginia. The meeting was held during the 2019 Annual Membership Meeting.

The following directors participated:

Dave Mereness (FL) 2021 President
Kelly Morgan (FL) 2019 Vice President
Robbie Shields (FL) 2021
Tim Barber (TN) 2019
Katrina Rote (FL) 2019
Jo Ann Fuller (AL) 2021 Sec./Treas., National Director
Joanna McClendon (TN) 2020

Directors not participating:

Bob Farmer (FL) 2021
Clay Worden (FL) 2019
Jamie Bowling (AL) 2020
Thomas Hallin (AL) 2020

Others in Attendance:

Danny Long (TN)
Wendy Elliott (FL)
Alexa Bishop (FL)
Muhammad Adam (FL)

Dave Mereness, Chapter President, called the meeting to order.

I. **Approval of Minutes of Previous Meetings:**

Minutes of the previous meeting held on June 25, 2018 were approved.
II. **Merger Status:**

President Mereness described the merger between the South Atlantic and Capitol Chapters to the assembled group. He informed us that the current directors of the Atlantic Chapter are Dave Mereness, Bryanna Fredericks, Dave Antoni and Jo Ann Fuller. With the help of Attorney Todd Eskelsen, Eskelsen Law Group, LLC all documents have been prepared and filed. There will be a new bank account established at Regions Bank. The chapter dues for the Atlantic Chapter will be $30 annually for renewals after June 30, 2019.

III. **Treasurer’s Report:**

The Treasurer’s Report was given to the group by Jo Ann Fuller, Secretary/Treasurer. The report will also be given to the attendees in the General Business Meeting on Tuesday morning.

IV. **Director Nominations:**

The new Atlantic Chapter must elect officers and directors and create committees. The Board decided that the new schedule for Board members should be three-year classes with four members per class. In order to establish this schedule, four candidates will be selected with term expiration of 2020, 2021, and 2022.

The following directors will be presented to the membership in the General Business Meeting of the Chapter:

- David Antoni 2020
- Muhammad Adam 2020
- Joanna McClendon 2020
- Marc Zeff 2020
- Jill Baker 2021
- Andrea Gallagher 2021
- Katrina Rote 2021
- David Mereness 2021
- Andy Reading 2022
- Wendy Elliott 2022
- Bryanna Fredericks 2022
- Tim Barber 2022
V. 2019/2020 Officer Slate and Chairs

Subject to director elections at the business meeting, the Board approved the following slate of officers and chairs for the 2019/2020 year.

President                Bryanna Fredericks
First Vice President     Joanna McClendon
Second Vice President    Wendy Elliott
Sec./Treas.              Andrea Gallagher
Immediate Past President David Mereness
National Directors       Katrina Rote, David Antoni
Membership               Muhammad Adam, Alexa Bishop (Chair), Steph Chandler, Jennifer Schaal, Robbie Shields, Bryanna Fredericks
Newsletter & Communications Danny Long (Chair), Brian Kitchens
Program & Education      Wendy Elliott, Katrina Rote, Bryanna Fredericks (Chair), Jill Baker, Dave Antoni, Marliss Carson, Andy Reading
Time, Place & Activities Katrina Rote (Chair), Wendy Elliott, Alexa Bishop, Marc Zeff, Robbie Shields, Steph Chandler,
Prizes                   Joanna McClendon (Chair), Robbie Shields, Danny Long
Publicity, Printing & Reg. Andrea Gallagher, Robbie Shields (Chair), Mary Edwards
Social Media             Wendy Elliott (Chair), Robbie Shields, Alexa Bishop, Andy Reading
Audit Committee          Danny Long (Chair), Tim Barber
Past President           Dave Mereness

V. 2020 Atlantic Chapter Meeting

The Board discussed various venues for the Atlantic Chapter 2020 Annual Membership and prepared a list of five sites to be presented to the membership. Those sites are Atlantic City, NJ, Boston, MA, Charleston, SC, Kiawah Island, SC, Nashville, TN. The membership will vote during the General Business Meeting. The tentative dates for the conference are June 14-June 16, 2020.

The Board asked the Program & Education Committee to begin preparing for the 2020 program.

Vi. Other Business

There being no further business, the meeting was adjourned.

Jo Ann Fuller
Secretary/Treasurer
June 23, 2019
Dave Mereness, Chapter President, called the 2019 Annual Business Meeting to order at the Sheraton Virginia Beach Ocean Front Hotel in Virginia Beach, Virginia.

President Mereness informed the membership that the merger of the South Atlantic and Capitol Chapters was completed effective June 1, 2019, and that all documents had been filed. The initial board members actions were ratified by the membership.

**Minutes of Previous Meeting**

Minutes of the previous business meeting dated June 26, 2018 were approved as submitted.

**Financial Report**

Jo Ann Fuller, outgoing Secretary/Treasurer gave the financial report to the membership, and Danny Long delivered an unqualified audit report on the May 31, 2019 financial statement.

**Director Elections:**

The Atlantic Chapter must elect officers and directors and create committees. The Board decided that the new schedule for Board members should be three-year classes with four members per class. In order to establish this schedule, four candidates will be selected with term expiration of 2020, 2021, and 2022.

The following directors are recommended by the Board of Directors to the membership:

- David Antoni 2020
- Muhammad Adam 2020
- Joanna McClendon 2020
- Marc Zeff 2020
- Jill Baker 2021
- Andrea Gallagher 2021
- Katrina Rote 2021
- David Mereness 2021
- Andy Reading 2022
- Wendy Elliott 2022
- Bryanna Fredericks 2022
- Tim Barber 2022
V. **2019/2020 Officer Slate and Chairs**

Subject to director elections at the business meeting, the Board approved the following slate of officers and chairs for the 2019/2020 year.

**President** Bryanna Fredericks
**First Vice President** Joanna McClendon
**Second Vice President** Wendy Elliott
**Sec./Treas.** Andrea Gallagher
**Immediate Past President** David Mereness
**National Directors** Katrina Rote, David Antoni

**Membership** Muhammad Adam, Alexa Bishop (Chair), Steph Chandler, Jennifer Schaal, Robbie Shields, Bryanna Fredericks

**Newsletter & Communications** Danny Long (Chair), Brian Kitchens
**Program & Education** Wendy Elliott, Katrina Rote, Bryanna Fredericks (Chair), Jill Baker, Dave Antoni, Marliss Carson, Andy Reading

**Time, Place & Activities** Katrina Rote (Chair), Wendy Elliott, Alexa Bishop, Marc Zeff, Robbie Shields, Steph Chandler,

**Prizes** Joanna McClendon (Chair), Robbie Shields, Danny Long
**Publicity, Printing & Reg.** Andrea Gallagher, Robbie Shields (Chair), Mary Edwards
**Social Media** Wendy Elliott (Chair), Robbie Shields, Alexa Bishop, Andy Reading
**Audit Committee** Danny Long (Chair), Tim Barber
**Past President** Dave Mereness

There were no other nominations from the floor. Nominees for terms as noted above were elected by acclamation.

**Meeting Location/Dates for 2020**

The Board discussed various venues for the Atlantic Chapter 2020 Annual Membership Meeting. Potential sites as recommended by the Board were Atlantic City, NJ, Boston, MA, Charleston, SC, Kiawah Island, SC and Nashville, TN. A vote was taken with the results announced later in the morning with Boston, MA receiving the most votes. The Time, Place & Activities Committee will research venues in the Boston area that will meet the Chapter’s needs and will advise the membership.

The Board asked the Program & Education Committee to begin preparing for the 2020 program.

**Report from National Office**

Rather than having a National Update during the business meeting, the National Vice President, Mr. Nick Mueting, gave an update to the group during lunch. It was informative and well received, and the Atlantic Chapter appreciated having representation from the National Board in attendance.
Other Business

Dave Mereness, outgoing President, thanked the membership for allowing him to serve in the capacity of Chapter President for the past year. He was presented a plaque of appreciation by the membership.

Also, the membership recognized yours truly as outgoing Secretary/Treasurer/National Director for the South Atlantic Chapter and presented me with a beautiful plaque and gift card. Being humbled, honored and grateful for the recognition, I thanked the membership for their thoughtfulness.

There being no other business, the business session was adjourned.

Jo Ann Fuller
Secretary/Treasurer
June 25, 2019
## NSAC: South Atlantic Chapter

### DATE PREPARED:
31-May-19

### PREPARED BY:
Jo Ann Fuller  
Secretary/Treasurer

### Fiscal Year Ended 5/31/2019

#### REVENUES:

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership Dues (Rebates) Collected</td>
<td>4,350.00</td>
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<tr>
<td>Registration Fees Collected</td>
<td>12,820.00</td>
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**Total Deposits**  
17,170.00

#### EXPENSES:

**Annual Meeting:**

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
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<tr>
<td>Meeting Expenses-2019</td>
<td>1,242.00</td>
</tr>
<tr>
<td>Meeting Expenses-2018</td>
<td>22,977.38</td>
</tr>
<tr>
<td>Bank Fees</td>
<td></td>
</tr>
</tbody>
</table>

**Total Disbursements**  
24,219.38

#### Excess of Revenue over Expense
(7,049.38)

**Cash Balance, Beginning of the Year (6/1/18)**  
60,333.68

**Cash Balance (05/31/19)**  
53,284.30
Tax, Finance & Accounting Conferences for Cooperatives
Denver, CO August 4-7, 2019

This two-and-a-half day program offers proven strategies, tools and resources to help your co-op increase efficiencies, improve financial controls, streamline regulatory compliance and make transactions manageable.

REGISTER
Pictures from our Chapter Meeting at Virginia Beach, VA in June 2019
A fine is a tax for doing wrong. A tax is a fine for doing well.

If you can pass the CPA exam, just think of how easy everything else in life will seem.

ONLY ACCOUNTANTS CAN SAVE THE WORLD!
...through peace, goodwill and reconciliations.

http://myaccountingplus.com

When the mailman doesn't have your W-2's
New Member Enrollment Application

National Society of Accountants for Cooperatives
136 South Keowee Street | Dayton, OH 45402
Phone: (937) 222-8707 | Fax: (937) 222-5794
info@nsacoop.org | www.nsacoop.org

Name (First/Middle/Last):__________________________________________

Salutation (name you prefer to be called by if different from above):________________________

I was referred to NSAC by (member name)______________________________

Chapter(s) I want to join (refer to next page):________________________________________

I prefer correspondence to go to my: ☐ Firm Address ☐ Home Address Are you a former member of NSAC? ☐ Yes ☐ No

Company Information:
Job Title________________________________________________________
Firm Name_______________________________________________________
Mailing Address, City, State, Zip, Country: __________________________
Package Address (Street, City, State, Zip) for FEDEX, UPS, etc if different from above address: __________________________

Work Phone + extension: __________________________ Fax: __________________________ Toll free number: __________________________
Email: __________________________ Web: __________________________
CEO or General Manager’s Name: __________________________

Home Information: We do not sell or provide your information without your permission. Because NSAC membership is individual we request your personal information in case we are unable to reach you at your firm/company or you leave your firm and we can’t get a forwarding address from them. It will not be accessible to others on the website unless it is the only address you give us or it is your preferred address for mailings.
Home Address:__________________________________________________
Home Phone:_____________ Cell Phone:____________________________ Email: __________________________

Professional Information Are you a CPA? ☐ Yes ☐ No

Number of years in a cooperative activity or providing professional support to a cooperative activity:
Other relevant professional certifications:

Demographic Information (optional)

Birth date: __________________________ ☐ Male ☐ Female
Name of School City/State Degree and Year

1. __________________________
2. __________________________

Each application MUST be accompanied by a check or charge for both (1) national and (2) chapter dues. Dues are non-refundable. *Retired members are not required to pay chapter dues.
Check enclosed $ _____________ Charge $ _____________ to my: ☐ Visa ☐ MasterCard ☐ AMEX
Card #: __________________________ Exp: __________ Cardholder Signature: __________________________
Print name on credit card __________________________
Credit card billing address: ☐ Firm Address ☐ Home Address Other: __________________________
Signature: __________________________________ Date: _________________

Approval of this application is subject to final endorsement by the Executive Board
Membership Types

All memberships are individual memberships and are not transferable.

REGULAR: To be eligible for regular membership, an individual shall be employed by or affiliated with a cooperative association, be engaged in providing professional services for cooperatives, or shall otherwise be engaged in the furtherance of cooperative principles. The national annual membership service fee is $175.00 and covers 1 year of membership from the date enrolled. NSAC membership dues must include payment of national membership service fees plus applicable chapter dues (listed below).

RETIRED: To be eligible for retired membership, an individual must have a minimum of five years active membership in good standing, have reached age 55, and be retired from active business under provisions of a formal retirement plan or through amicable arrangement with his or her employer which results in a complete severance or material reduction in compensation, or have retired because of permanent disability. The national membership service fee is $50; there are no chapter dues required.

CHAPTER MEMBERSHIP AND DUES

Chapter membership is required as a condition of membership in NSAC. Ten chapters have been organized using state boundaries as set forth below. Members usually affiliate with the chapter covering the state in which they live or work. However, NSAC recognizes that for professional, geographic or other reasons members may prefer to affiliate with a different chapter or with more than one chapter.

Dues are assessed on the basis of all chapters chosen. Please designate on page 1 the chapter(s) in which you want to hold membership. If no choice is made, a chapter assignment will be made based on address. If joining more than one chapter, the first chapter listed on page 1 will be considered your primary chapter for voting purposes.

<table>
<thead>
<tr>
<th>CHAPTERS AND CHAPTER DUES</th>
<th>OCCUPATIONS (check the box which applies)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capitol (CT, DC, DE, MA, MD, ME, NH, NJ, NY)</td>
<td></td>
</tr>
<tr>
<td>PA, PR, RI, VA, VT, WV)</td>
<td>Accountant – Tax</td>
</tr>
<tr>
<td>Electric Cooperative (nation-wide)</td>
<td>Association Management</td>
</tr>
<tr>
<td>Far Western (AZ, CA, HI, NV, UT)</td>
<td>Attorney</td>
</tr>
<tr>
<td>Great Lakes (MI, WI)</td>
<td>Bookkeeper</td>
</tr>
<tr>
<td>Mid-West (CO, KS, NE, NM, OK)</td>
<td>CFO/COO/President</td>
</tr>
<tr>
<td>Mississippi Valley (AR, IA, IL, IN, KY, OH, MO, MS)</td>
<td>CEO/Controller/ Treasurer</td>
</tr>
<tr>
<td>North Central (MN, ND, SD)</td>
<td>Accountant or Auditor General</td>
</tr>
<tr>
<td>Pacific Northwest (AK, ID, MT, OR, WA, WY)</td>
<td>Accountant – Tax</td>
</tr>
<tr>
<td>South Atlantic (AL, FL, GA, NC, SC, TN)</td>
<td>Association Management</td>
</tr>
<tr>
<td>Texas (LA, TX)</td>
<td>Attorney</td>
</tr>
<tr>
<td>Canada (C. Forming)</td>
<td>Bookkeeper</td>
</tr>
<tr>
<td>Coastline (CA, HI, NV, OR, WA)</td>
<td>CFO/COO/President</td>
</tr>
<tr>
<td>Midwest (IL, IN, MI, MN, OH, WI)</td>
<td>CEO/Controller/ Treasurer</td>
</tr>
<tr>
<td>Northeast (CT, DE, ME, MA, NH, NJ, NY)</td>
<td>Accountant or Auditor General</td>
</tr>
<tr>
<td>Southern (MS, NC, SC, TN, VA, WV)</td>
<td>Accountant – Tax</td>
</tr>
<tr>
<td>Western (AZ, CA, CO, CO)</td>
<td>Association Management</td>
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<td></td>
<td>Attorney</td>
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<tr>
<td></td>
<td>Bookkeeper</td>
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<tr>
<td></td>
<td>CEO/Controller/ Treasurer</td>
</tr>
</tbody>
</table>

WHERE ARE YOUR FIRM’S CUSTOMERS

☐ Local (county and/or surrounding counties) ☐ Regional (state and/or surrounding states) ☐ Nationwide ☐ International

CO-OP TYPE (Check the box which applies; if not a cooperative, check the last box.)

☐ Agricultural Marketing
☐ Banking/Financial Services
☐ Distribution/Logistics
☐ Education/Childcare
☐ Energy, Electric/Distribution
☐ Energy, Electric Power Supply
☐ Energy, State-Wide Associations
☐ Energy, Other:
☐ Farm Supplies & Services
☐ Grocery, Retail or Wholesale
☐ Franchise
☐ Funeral & Memorial Societies
☐ Hardware/Lumber
☐ Healthcare
☐ Housing & Related Industries
☐ Information Technology
☐ Insurance
☐ Marketing, Other:
☐ Purchasing, Other:
☐ Service, Other:
☐ Telephone & Communication
☐ Transportation
☐ Other:
☐ Not a Cooperative

National Society of Accountants for Cooperatives | 136 South Keowee Street | Dayton, OH 45402
(937) 222-6707 | Fax (937) 222-5794 | info@nsacoop.org | www.nsga.coop

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