

FEI PEER GROUP MEETING

**TUESDAY
AUGUST 25, 2015**

LOCATION

Keller, Inc.
N216 State Road 55
Kaukauna, WI 54130

[Click Here for Map](#)

TIME

2:00 PM – 4:30 PM

REGISTER BY

August 18, 2015

[Click Here to Register](#)

CANCELLATION POLICY

Please send cancellations to mwcomfoxcities@gmail.com no later than 5:00 PM on Tuesday, August 18, 2015.

FEES

There are no fees associated with this meeting.

CPE

This meeting is eligible for 3.0 CPE Credits for those that attend the entire meeting in-person.

FEI Peer Group welcomes you to attend our first meeting of fiscal year 2015 - 2016!

Peer Group is an opportunity for our members to share ideas and thoughts on topics important to each of us and our businesses. All chapter members are welcome to share and gain information used daily in our financial positions. Specific discussion topics are determined by the members attending.

We keep the discussions *confidential* so participants know they can address the specific details of issues they are facing in their profession. To give you a better idea of what subjects might be covered, below is a sample list of agenda items from recent Peer Group meetings. **You are encouraged to add your topics of interest through the online registration process.**

Sample List of FEI Peer Group Discussion Topics

Human Resources:

- HR policy manuals
- Employee benefit statement

Administration:

- Cell phone usage policy:
 - Do you let employees use their own personal smart phones to download work emails?
- Do you have a wiping policy if the employees leave employment?
- Has anyone used a firm to audit payables to see if you are paying too much in sales & use tax?
- Has anyone used a firm to audit utility bills?
- What pay range is used for accountants and accounting supervisors?
- Structure of accounting area
- Information technology consultants – any recommendations?
- Recruiting
- Anyone using JobBoss?
- Acquisition integration
- Pay increases for coming year
- Internal compliance or use of outside professional providers?

Banking/Financing:

- Banking & financing trends
- Ideas for improving cash flow
- Financing terms/arrangements
- Anyone using purchasing cards – positives/negatives
- Hedging interest rates – anyone looking at a SWAP?
- Direct deposit for payroll required? Are bonus payments also directly deposited?

IT:

Internal IT department structures versus external IT vendors.



August 25, 2015 Peer Group Meeting Flyer (Continued)

Sample List of FEI Peer Group Discussion Topics (Continued)

Insurance:

- Wellness programs
 - What is everyone doing?
 - Do you use a third party to help with wellness programs?

Affordable Healthcare Act

- Property and other Insurance pricing trends
- Fees paid to consultants for group benefit plans (health, dental, STD, LTD, vision, etc.)
- Overhead cost absorption allocations and methods
- Special instructions for handling claims for general liability or other insurance
- Prevention training in employee practices liability or fiduciary/fraud
- Coverage for cyber liability/pollution

Retirement Plan Administration:

- Does your company offer a Profit Sharing Plan or 401K Plan with a match?
 - Criteria to payout – do you need to attain certain profit goals?
 - How much does the company contribute?
- How do your employees react?
- Retirement plan third party administrative fees and services – any creative ideas for low money market rates?

Taxes:

- Highlights and lowlights of recent income or sales tax audits
- State Nexus issues
- Tax trends

General:

- Business risks, does anyone define and actively manage?
- Economic outlook and general business climate



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August 25, 2015 Peer Group Meeting: Instructional Method: Group-live **Experience Level:** Basic **Prerequisites / Advance Preparation:** None **Field of Study:** Specialized Knowledge & Applications **Recommended CPE Credits:** 3.0.

For FEI CPE credits, one credit hour equals 50 minutes according to NASBA guidelines. Some state boards may differ on how many minutes constitute a credit hour. Contact your state board for more information. For more information regarding administrative policies such as complaint and refund, please contact Michelle Weiss, Chapter Administrator: mwcomfoxcities@gmail.com.