financial executives international
northeastern wisconsin chapter

1st Place Winner!
FEI National Member Development Award
7 out of last 8 Years!
AND
FEI National Chapter Excellence Award
2012-2013 and 2013-2014

Northeastern Wisconsin Chapter Newsletter
January/February 2015

MISSION STATEMENT FEI of Northeastern Wisconsin strives to be the premier association exclusively for financial professionals. Our mission is to advance the success of senior-level financial professionals and their organizations.

NEWSLETTER CONTENTS

Date/Location	Professional Development	Keynote Speaker
Tuesday, September 16, 2014 Rock Garden Conference Center Green Bay, WI	**Presentation by Godfrey & Kahn and Wipfli** **Topic:** *Estate Planning for Business Owners and Officers*	**Craig Dickman**, CEO|Chief Innovation Officer – Breakthrough Fuel **Topic:** *Moving Markets Through Innovation*
Tuesday, October 21, 2014 Liberty Hall Banquet & Conference Center Kimberly, WI	**Presentation by AON** **Topics:** *1. Supply Chain Risk Overview* *2. Health & Benefit Best Practice Overview*	**John Bykowski**, Chairman of the Board – SECURA Insurance **Topic:** *The Relationship Business: Inspiring a Genuine Culture*
***Thursday, November 20, 2014** Rock Garden Conference Center Green Bay, WI	**Presentation by Baker Tilly** **Topic:** *How to Navigate Through the World of Corporate Fraud*	**Mitch Danaher**, Deputy Controller – General Electric Company **Topic:** *Changing the Work Paradigm: a GE Perspective*
Tuesday, January 20, 2015 Liberty Hall Banquet & Conference Center Kimberly, WI	**Presentation by Schenck and Red Shoes PR** **Topic:** *Crisis Management: Is Your Organization Prepared for a Crisis?*	**Mike Weller**, Group President – ITW Welding/Miller Electric Manufacturing Co. **Topic:** *Increasing the Profitability of Your Company Through Empowerment and 80/20*
Tuesday, February 17, 2015 Rock Garden Conference Center Green Bay, WI	**Presentation by Associated Financial Group** **Topic:** *The Future of Executive Compensation: An Essential Conversation*	**Jeff Joerres**, Executive Chairman – ManpowerGroup **Topic:** *Human Age/Human Capital*
***Wednesday, March 18, 2015** Bridgewood Conference Center Neenah, WI	**Presentation by Experis & Right Management** **Topics:** 1. *Talent Management Trends* 2. *Cyber Threats: Are we Defenseless Against Emerging Attacks?*	**Jim Ostrom**, Partner, President & CEO – Milk Source, LLC **Topic:** *TBD*
Tuesday, April 21, 2015 Rock Garden Conference Center Green Bay, WI	**Presentation by Mason Wells** **Topic:** *Case Studies in Private Equity and the Role of the CFO*	**Kate Burgess**, CEO – Elevate97 **Topic:** *TBD*

*Please note these meetings will take place on a day of the week other than a Tuesday.

2014-2015 FEI Program Schedule (Continued)

Diversity Group Events

Tuesday, 9/9/14 – 2:00 pm
Tuesday, 2/24/15 – 5:30 pm
Thursday, 3/12/15 – 7:30 am
Tuesday, 5/19/15 – 8:00 am

Summer Golf Outing

Monday, 8/3/15
Butte des Morts Country Club
Appleton, WI
11:30 am – 7:30 pm

Peer Group Meetings

Tuesday, 8/26/14 – 12:30 pm
Thursday, 11/6/14 – 2:00 pm
Thursday, 2/26/14 – 2:00 pm
Keller, Inc.
Kaukauna, WI
2:00 – 4:30 pm

Additional Peer Group Meetings

Thursday, 5/21/15

Chapter Promotion Opportunity

Wednesday, 4/29/15
Leaders Forum (Sponsored by AFG)
Bridgewood Conference Center
Neenah, WI
Speaker: Joseph Grenny, one of the Authors of the Book “Crucial Conversations”
8:00 am – 12:00 pm

Chapter President’s Message

The weather cooperated for our January meeting which aided in good attendance for the presentations and social time. Kim Houlton with Schenck SC, and Maria Nelson with Red Shoes PR led a lively discussion on “Crisis Management”. There were many good questions from the attendees. Mike Weller, Group President of ITW/Miller Electric Manufacturing Company, shared his experiences in organization culture, empowerment and 80/20. His presentation was well received with valuable input and questions from the audience.

Since we are at the mid-point of our chapter year I want to provide an update on some of our initiatives for the year. They are in addition to our annual goals of membership growth and of providing meetings with excellent content.

1. Enhance the Strategic Partner Program within the Chapter (Greg Williams, Chair) – Greg and Howard Bornstein held a formal meeting on October 31st with representatives of our Strategic Partners to review expectations of both parties and discuss goals and improvements. There were productive discussions on how to improve our professional development programs and keynote speaker presentations. Greg and Howard are summarizing the ideas and formulating a plan for our next chapter year. The plan will be presented to our board of directors in February or May of this year.

2. Develop Public Relations and Improve Communications (Martha VandeLeest, Chair) – Martha and her Committee Members have been working with Michelle Weiss, Chapter Administrator, and the Red Shoes PR Firm to transition to an e-newsletter, improve the web site experience, promote other communications vehicles, and pursue media outreach opportunities. Jim Rubright, PR Committee Member and 2nd VP of our Chapter, announced at the January meeting that the PR Team is in the process of building and developing a website specifically for our chapter. There are many more exciting things to come from PR this year. Stay tuned!

3. Chapter Administrator Training & Documentation (Jim Kiekhaefer, Chair) – Michelle Weiss and I have been documenting the duties and procedures of the Chapter Administrator and President in order to provide future continuity and ease of annual leadership transitions. We are both learning and I believe Michelle will provide valuable assistance to future Chapter Presidents and Board Members.
4. Communication of National Agenda (Mike McNamara, Chair) – Mike continues to communicate to and educate the Board and Members on important opportunities and changes at FEI National. He was instrumental in arranging for Mitch Danaher, Chairman of the Board of FEI National, to be our keynote speaker last November.

Our next monthly meeting is Tuesday, February 17, 2015 at Rock Garden in Green Bay. Representatives from Associated Financial Group will lead a panel discussion during the Professional Development session on “The Future of Executive Compensation”. Jeff Joerres, Executive Chairman of ManpowerGroup, will be our keynote speaker and talk on “Human Age/Human Capital”. Be sure not to miss it.

See you in February as the weather continues to warm.

Jim Kiekhaefer
2014-2015 Chapter President
jim.kiekhaefer@bugtusselwireless.com

January 20th Chapter Meeting Photos:

(Pictured left) Kim Houlton of Schenck and Maria Nelson of Red Shoes PR were the featured Professional Development Speakers, and gave a presentation on Crisis Management. **(Pictured middle)** Mike Weller of Miller Manufacturing giving his Keynote Speaker Presentation. **(Pictured right)** Mike Weller, Jim Kiekhaefer and Diane Roundy. **(Pictured below)** Attendees during Mike Weller's presentation on Empowerment and 80/20.

Save the Date Reminders!

Career Management Seminar

2015 FEI Career Management Seminar

Thursday, May 14, 2015
Bridgewood Conference Center
Neenah, WI, 8:30 am – 4:30 pm

The seminar will be presented by senior consultants from Right Management, a unit of the ManpowerGroup. Five sessions will be held for career enhancers and career changers. An event invitation will be sent once content and speakers are finalized. Attendees will be eligible to receive CPE credit(s).

2015 Golf Outing

2015 Chapter Golf Outing & Social Event

Monday, August 3, 2015
Butte des Morts Country Club
Appleton, WI, 11:00 am – 7:30 pm

Event Schedule:

- 11:00 am – Driving range / Practice Green
- 12:30 pm – Shotgun Start
- 5:30 pm – 19th Hole Social Period
- 7:30 pm – Event Conclusion

If you are interested in joining the planning committee, please contact Doug Stecker (dstecker@kellerbuilds.com), or Joe Topp (joseph.topp@francisinvco.com).

February Chapter Meeting

LOCATION
Rock Garden Conference Center
1951 Bond Street
Green Bay, WI 54303
Click Here for Map

TIME
2:00 PM – 4:05 PM
Professional Development Session

4:15 PM – 5:30 PM
Keynote Speaker Presentation

5:30 PM – 5:45 PM
Business Meeting & Recognition of Patti Ayala's Service to FEI

5:45 PM – 7:30 PM
Social Period & Buffet Style Dinner

For this event the social period and dinner will be combined. We will have pub tables for those who wish to stand and enjoy a beverage and the buffet, as well as traditional dinner tables for those who prefer to be seated with their colleagues.

REGISTER BY
February 10, 2015

Click Here to Register

CPE CREDITS
Professional Development Session Qualifies for 2.5 Credits. Keynote Speaker Presentation Qualifies for 1.5 Credits

CANCELLATION POLICY
Please send cancellations to mwcomfoxcities@gmail.com no later than 5:00 PM Tuesday, February 10, 2015.

FEES
This meeting is free for FEI Members, strategic partners and prospective member guests.

Keynote Speaker Presentation

Jeffrey A. Joerres

Executive Chairman, ManpowerGroup
Topic: Human Age/Human Capital

Jeffrey A. Joerres assumed the role of ManpowerGroup Executive Chairman on May 1, 2014 after 15 years as CEO. Having joined the organization in 1993, Joerres served as Vice President of Marketing and Senior Vice President of European Operations and Global Account Management. In 1999, he was named CEO, and in 2001, Chairman of the Board.

Joerres led a transformation of ManpowerGroup's business strategy, adding new business lines that have expanded the company's ability to help clients and candidates win in the changing world of work.

Under Joerres' tenure, ManpowerGroup experienced rapid growth, expanding the footprint of the organization to 3,100 offices across 80 countries and territories.

ManpowerGroup has climbed the ranks of the Fortune 500 American companies list, moving from 183 to 144 in 2014. ManpowerGroup was also named to the Ethisphere Institute's list of the World's Most Ethical Companies, the only company in the industry to be recognized for four consecutive years.

In addition to the ManpowerGroup board, Joerres is past Chairman and current member of the Federal Reserve Bank of Chicago board of directors, serves on the boards of Johnson Controls, the US Council for International Business (USCIB), and the Committee for Economic Development (CED), and is chair of the Future Workforce Committee of the Greater Milwaukee Committee. Joerres has a bachelor's degree from Marquette University's College of Business Administration.

Professional Development Session

A Panel Discussion Presented by Associated Financial Group

Topic: The Future of Executive Compensation: An Essential Conversation

With the advent of many market reforms and compliance obligations stemming from the Affordable Care Act, employers are scrambling to be at the forefront of this paradigm shift. One specific area of change is the executive compensation model. The popularity of executive-only health plans is receding, partly due to specific ACA reforms and partly due a changing insurance industry. Contributing to this movement are population factors and a shift in employment values, as the baby-boomer generation increasingly retires and the age of those employees filling key positions decreases.

(continued on next page)

Professional Development Session (Continued)

Please join us for an informative and spirited discussion about the future of executive compensation and benefits. Our panel of experts will approach this topic from all angles, focusing on health benefits, key-person insurance, retirement planning and personal trust services. Through interviews and case studies, we'll discuss why employers of all sizes and industries continue to place importance on using specialty executive compensation to attract and retain key employees. Our experts will also showcase examples of employers who are leading the way in finding alternatives to traditional compensation models that are both cost-effective and attractive.

Associated Bank Panel Discussion Moderator

Bret A. McKitrick, J.D.

Vice President, Human Resources Consultant

Bret McKitrick has practiced law exclusively in employee benefits and human resources, representing both private and public sector employers of all sizes. Through training and one-to-one counseling, Bret works with HR professionals to ensure they have a clear understanding of the rules governing all aspects of human resources. He helps management teams develop strategies to streamline HR functions and provide employee benefits that are both attractive and cost-effective. He works with employers to maintain compliance of health and wellness benefit packages under state and federal guidelines, including rules of taxation and Health Care Reform. Bret holds a Bachelor of Science in Economics from the University of Kentucky and a Juris Doctor from the University of Pittsburgh School of Law. He is licensed to practice law in Wisconsin and West Virginia. Bret is a frequent speaker in areas of: PPACA, ERISA, COBRA, HIPAA, ADA, FMLA, FLSA, 401(k)/403(b) compliance, payroll, and federal taxation.

Associated Bank Panel Discussion Presenters

Jeff Bartosic, CLU, ChFC

Vice President, Advanced Planning Specialist

Jeff Bartosic has been in the financial services industry for over 40 years. He uses individual life, disability and long-term care insurance as tools to support trust, commercial lending, employee benefits and private banking customers of Associated Bank. Jeff's wide range of experience allows him to expertly assess clients' needs and develop the most effective solutions. Jeff has been with Associated Financial Group since 1989.

Professional accomplishments

Finance, University of Wisconsin - Madison, Madison, WIM.S., American College
CLU – Chartered Life Underwriter
ChFC – Chartered Financial Consultant
Past president, Northeastern Wisconsin CLU
Member and past president, Fox Valley Estate Planning Council
Continuing education, over 30 hours a year

Mardi Burns, CHC

Senior Vice President, Senior Benefits Consultant

Mardi Burns has over 30 years of experience in employee benefits, with a focus on assisting medium to large employers design, implement and manage their benefit plans. Her specialties include multi-sited self-funded plans, strategic benefit planning facilitation, public employer plans and integrating the benefit strategy with engagement and wellness strategies.

Associated Bank Panel Discussion Presenters (Continued)

She also provides renewal and benefit analysis, union negotiation consulting, employee education, healthcare reform analysis and planning and wellness consultation, while keeping an eye on strategic recommendations. Mardi has been involved in the design and implementation of several employer on-site and near-site health clinics including facilitating cooperative multi-employer clinics. Additionally, Mardi is a frequent speaker on employee benefits costs and solutions. Mardi's goal is to be an integral part of the client's team, using her background to develop creative, proactive strategic benefit plan solutions.

Mardi joined Associated Financial Group in 1987 as a consultant and in 1993 was promoted to senior consultant. Previously, Mardi spent nine years with a major insurance provider working with national accounts.

Professional accomplishments

Business Administration, University of Wisconsin – Madison, Madison, WI
M.B.A., University of Wisconsin – Oshkosh School of Business
CHC – Certified Health Consultant

Robert Riolo

Senior Vice President, Regional Trust Manager

Bob Riolo is senior vice president, regional trust manager at Associated Private Client Services. He joined Associated in 2001 as vice president, personal trust manager, at which time his responsibilities included oversight of all personal trust administration services including a total client portfolio of more than $1 billion.

Today he has responsibility for leading Associated's Private Client Services group, which has assets of $1.48 billion and $11 million in annual revenue, as well as implementation of the client delivery model for the Fox Valley and Lake Shore Regions.

Bob's more than 25 years of banking industry experience includes roles of increasing responsibility at Superior National Bank & Trust Co. in Hancock, MI, where he first worked as business development officer, advancing to investment manager, and later to vice president of trust, with responsibility for overall trust administration, operations and strategic planning, advancing the bank's trust assets from $75 to $190 million.

Bob is an accredited Fiduciary Investment Manager and a graduate of the Michigan Bankers Trust School program. He has served on the national board of directors and as local chapter president of Little Brothers – Friends of the Elderly. His other community service includes board membership on the Scholarships, Inc. Advisory Board and local school board president.

Mike Shlensky

Senior Vice President, Director of Retirement Plan Services

Mike Shlensky is Senior Vice President, Director of Retirement Plan Services for Associated Institutional Trust Services. He is responsible for leading, developing, executing and managing the unit's business plan, including product management, sales and client service delivery processes. He has been a member of the Associated team since 2013, and brings more than 30 years of retirement and institutional trust services experience to his clients.

Mike holds a Bachelor of Business Administration degree in finance, investments and banking from the University of Wisconsin – Madison. He is also a graduate from the Bank Administration Institute with a Trust and Financial Service major.

Active in the community, Mike is a board member of the Congregation Shalom and the business mid-management committee at Milwaukee Area Technical College. He is an affiliate member of the American Society of Pension Professionals and Actuaries and the Wisconsin Retirement Plan Professionals, Limited.

Financial Executives International (FEI) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.

February 17, 2015 Chapter Meeting: Instructional Method: Group-live **Experience Level:** Basic **Prerequisites / Advance Preparation:** None **Field of Study:** Professional Development Session = Specialized Knowledge & Applications; Keynote Speaker Session = Personal Development. **Recommended CPE Credits:** Professional Development Session = 2.5; Keynote Speaker = 1.5.

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.

Diversity Group

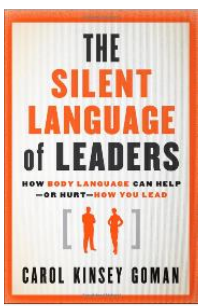
The Diversity Group is pleased to offer three upcoming events. Please review the below summaries and register today!

Diversity Group Social/Round Table Discussion

This event will take place on **Tuesday, February 24th** beginning at **5:30 pm** at the **Appleton Beer Factory** (603 W. College Ave. Appleton, WI 54914). The Appleton Beer Factory is newer to the Fox Valley having a wide selection of home brews; of course great wine options are also available. Additional details on the Appleton Beer Factory can be found at www.appletonbeerfactory.com. You can register by **clicking on this link.**

Diversity Group Book Club Review

The Book Club Review is scheduled for **Thursday, March 12, 2015**. We will meet at **7:30 am**, at **Coffee & Chocolate Bistro** in **Kimberly**. **Please click here to register for the event.** Participants can purchase The Silent Language of Leaders on Amazon by **clicking on this link**. Below is a summary of the book for your review.



In The Silent Language of Leaders, Goman explains that personal space, physical gestures, posture, facial expressions, and eye contact communicate louder than words and, thus, can be used strategically to help leaders manage, motivate, lead global teams, and communicate clearly in the digital age. The book draws on compelling psychological and neuroscience research to show leaders how to adjust their body language for maximum effect. It stands out as the only book to address specifically how leaders can use body language to increase their effectiveness. Goman, a respected management coach, is widely considered as the expert in body language issues in the workplace. The Silent Language of Leaders will show readers how to take advantage of the most underused skills in the leadership toolkit-nonverbal skills-to improve their credibility and stay ahead of the curve.

Diversity Group Breakfast

The Diversity Group Breakfast will take place on **Tuesday, May 19, 2015, at 8:00 am**. The event will be held at Rock Garden Conference Center, and will feature Trisha Lemery, President and CEO of Winsert, Inc. (pictured left) as our guest speaker. Trisha will be sharing her journey with Winsert, including the differences between men and women and managing millennials.
Please click here to register today!

Valorie Hamilton
Diversity Group Chair
valorie.hamilton@endries.com

Diversity Group meetings are open to *women* who are:
members of FEI NE Wisconsin Chapter; managers and executives within an FEI member's company; representatives of our Strategic Partner companies; prospective chapter members; or guests of any of the above.

Membership Update

This is a challenging year for membership as recruitment is down and severances are up compared to prior years. The severances have been mainly members who have not been able to be active and attend the Chapter functions. We would like to recruit ten new members between now and March 31, 2015. To support this effort National is offering a great membership price for new members who join from March 18 to March 31, 2015. **The national dues are normally $525.00. During this period they are offering a special rate of $399.00.** As far as I know this offer will not be repeated until next fall, if then. If you know of someone who would benefit from an FEI membership please reach out to them. If they have some interest please contact me and I will be happy to follow up from there. Thanks for all of your continued recruitment efforts especially to the members and strategic partners listed in the left-hand column.

Also a big thank you to those of you who attend our Chapter functions. We know it is a challenge. We constantly hear from many of you that "time" is one of the biggest challenges you face. As you have told us in surveys, you value the programs, networking and CPE the most. In order to realize these values you must attend the meetings.

Finally, thanks to all of you who have been completing our monthly Chapter meeting surveys. Over 70% of the members and strategic partners who have attended our first four meetings have completed the surveys. This is fantastic and we ask that you continue completing them. Your input is invaluable. Through the first four meetings this year the average overall meeting experience rating is 4.2 (on a scale of 1 to 5) which is excellent. If you have any questions about the survey please do not hesitate to contact me or pull me aside at a meeting.

Mike McNamara
Membership & Retention Chair
Mike.McNamara@tqmillwork.com
Office: (920) 533-4860, extension 222
Mobile: (920) 539-1255

Member Benefits 101
Getting to Know Your FEI

This one-hour webcast will give **all members** an insight into their FEI membership benefits and career services as well as updates on advocacy efforts, technical committee activities, and new research efforts from FERF (Financial Executives Research Foundation). The webcast will also cover upcoming conferences and webcasts of interest, provide a guided tour of the FEI website, and answer any questions you may have. We encourage all members to participate in this webcast that is usually held on the third Wednesday of each month at 1:00 p.m. CT.

The dates for the next webcasts are Wednesday, February 18 and Wednesday, March 18, 2015 at 1:00 p.m. CT. To register for a webcast, go to www.financialexecutives.org and click on "Events" and then "Webcasts" to register. If you have any questions about this webcast, please feel free to contact Mike McNamara.

MEMBERS AS OF THE END OF COMPETITION YEAR:

2008	107
2009	119
2010	139
2011	170
2012	199
2013	210
2014	226
2015	245 (GOAL)

Members as of
January 23, 2015: 222

Due to terminations and transfers,
our Chapter goal is to add
35 NEW members this fiscal competition year
ending March 31, 2015.

MEMBERSHIP RECRUITERS FOR CURRENT COMPETITION YEAR

GOLD RECRUITERS

Three or More Members
Joe Toonen (4) (Grant Thornton)

SILVER RECRUITERS

Two Members

BRONZE RECRUITERS

One Member

Jon Bilodeau (AON)
Fred Bowes
Tony Ellis
Kurt Gresens (Wipfli)
Bill Guc
Mark Heffernan
Amy Henselin (Grant Thornton)
Steve Huntington
Julie Kimps (Experis)
Theresa Lauer
Dave Nelson
Amy Schilling
Terry Ver Straate

Please Welcome Our Newest Chapter Members!

JAYME DEBRAAL
Director of Finance
Alta Resources
Neenah
Recruiter: Theresa Lauer

AMY GRINNELL
Chief Financial Officer
Network Health
Menasha
Recruiter: Amy Henselin

CHRISTOPHER LEE
VP - Finance & Administration
Lawrence University
Appleton
Recruiter: Joe Toonen

MIKE PIGEON
CFO
KCS International, Inc.
Oconto
Recruiter: Joe Toonen

In order to support our recruitment efforts this year, the Chapter Board has again approved offering a **MONEY-BACK GUARANTEE** for dues to new members if they do not find value in their membership. We are making this offer because we feel strongly about the value of our programs and networking opportunities. The details of this offer are as follows:

1. The Chapter will refund the national membership dues paid by any new members if they decide not to renew their membership after their first 12 months of membership.
2. Any new members whose applications are processed from July 1, 2014 through June 30, 2015, and who join the Northeastern Wisconsin Chapter, are eligible for this money-back guarantee.
3. Members who transfer in from or out to other chapters are not eligible.
4. The members must have attended at least four of the featured speaker presentations during the first 12 months of their membership.
5. As proof of their attendance, members must sign in and sign out on the attendance sheets for each meeting.
6. Within 60 days of their anniversary date of joining FEI, they must submit a written request for refund to Mike McNamara (mike.mcnamara@tqmillwork.com) and provide the reasons for FEI not meeting their expectations.
7. Any refunds approved will be issued in the same name and format (i.e. credit card, company check, etc.) as the amounts were originally paid.
8. In the event of any questions or disputes in administering this money-back guarantee, Mike McNamara will have sole authority to resolve the situation.
9. The effectiveness of this offer will be evaluated toward the end of the 2014-2015 fiscal year to determine whether to continue it for future years.

Please call someone today who you think might benefit from an FEI membership and invite them to this meeting. Thanks for your continued cooperation in helping to grow OUR Chapter.

Understand today's financial reality. Take your career to the next level. Collaborate with peers. Transform your company's financial future.

Monday, May 18 | Tuesday, May 19

Opening Reception on Sunday, May 17

Join your colleagues and peers at the Boca Raton Resort & Club for an unparalleled event designed to provide leadership development to senior-level financial executives. Summit's premier programming focuses on the challenges facing financial executives today with an innovative agenda comprised of content-rich presentations, multiple networking opportunities, respected speakers and an exciting exhibit hall.

Opening Keynote Address

Stephen M. R. Covey
President and CEO
Covey Leadership Center

Leading at the Speed of Trust

Tuesday Morning Keynote

Chris McChesney
Global Practice Leader
Franklin Covey

4 Disciplines of Execution

General Sessions

- The Rising Tide of Finance Challenges
- The Ethics Playbook: How to Win in Business with Ethics
- The Evolving Role of the Corporate Board

Concurrent Sessions

- The Strategic CFO: Four Orientations for Engaging in the Strategic Process
- Winning Through Data and Analytics
- Elevating Business in the Cloud
- Get Ahead of Cybercrime
- The Public Health Insurance Exchange: What It Means for Employers

NEW! Two Private and Public Company Concurrent Session Tracks … and much more!

Register online today!

summit.financialexecutives.org

Peer Group Meetings

FEI 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.

Denise Kitzerow
Peer Group Chair
dkitzerow@lakesidefoods.com

Next meeting: Thursday, February 26, 2015; click here to register!
2:00 pm – 4:30 pm at Keller, Inc.
N216 State Road 55, Kaukauna WI 54130

We keep the discussions ***confidential*** so participants can feel free to get into the specific details of issues they are facing in their professions. 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. The discussion topics for each meeting are determined by the member participants.

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 direct deposited?
- IT:
  - Internal IT department structures versus external IT vendors.
- Insurance:
  - Wellness Programs
    - ➢ What is everyone doing?
    - ➢ Do you use a Third Party to help with Wellness Programs?
  - Planning for ObamaCare
  - Property and other Insurance pricing trends
  - Fees paid to consultants for group benefit plans (health, dental, STD, LTD, vision, etc.)
  - Overhead cost Absorption Allocations & 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

2014-2015 Chapter Leaders

Contact Information

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Membership & Retention Chair
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Website:
www.financialexecutives.org

Jim Kiekhaefer	President and Programs Committee Chair
Doug Stecker	President-Elect, First Vice President and Professional Development Committee Chair
Jim Rubright	Second Vice President & VP Membership
Martha VandeLeest	Secretary and Publicity Chair
Barb Ristau	Treasurer
Mike McNamara	Membership & Retention Committee Chair and Headquarters Liaison
Greg Williams	Strategic Partner Liaison
Valorie Hamilton	Diversity Committee Chair
Denise Kitzerow	Peer Group Chair
Nick Guerrieri	Nominations Committee Chair
William Lepley	Academic Relations Committee Chair
Scott Dell	Career Management Committee Chair
Howard Bornstein	Board Member
Pam Turicik	Board Member
Mark Heffernan	Board Member

FEI Northeastern Wisconsin Chapter
Strategic Partners
Click on each company to visit their website.

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GODFREY & KAHN S.C.
Attorneys at Law

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Associated Financial Group

Grant Thornton
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