



Northeastern Wisconsin Chapter Newsletter

March/April 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.

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

*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, 2/26/15 – 2:00 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 is warming and it looks like spring is on its way. Spring is the time for us to begin planning for the next chapter year. Doug Stecker, incoming Chapter President, led a Speaker Planning Meeting on March 11th. It was well attended by directors and strategic partners. There were many great ideas generated for the 2015/2016 chapter meetings relative to improvement of Professional Development Sessions and continuing our history of top notch Keynote Speakers. Thanks to Doug and those who attended for helping to kick off the 2015/2016 chapter year on a positive note.

Our Annual Chapter Meeting was held on March 18th at Bridgewood Conference Center in Neenah in conjunction with our March chapter meeting and sessions. The members elected the slate of officers and directors as was recommended by the board of directors. A welcome to Larry Barton, 2nd Vice President, and Brenda Schultz as new Directors. A special thank you to Nick Guerrieri, Past President and Nominating Committee Chairman, who will be leaving the board of directors. Nick has been a great help to me this chapter year in my transition to President.

Our March meeting featured a keynote speaker from the dairy industry, which is somewhat new for our chapter. Jim Ostrom, President and CEO of Milk Source, LLC, reviewed sustainability initiatives for a large dairy company. He compared the old dairy model with the new dairy model and discussed the social perception paradox. I believe that some of our members were pleasantly surprised of the dairy industry's economic impact in our area. Kurt Johnson of Right Management and John Hainaut of Experis were presenters in the Professional Development Session. Kurt's topic was on Trends in Talent Management and John's was Cyber Threats. Both were very interesting and well received.

I look forward to seeing you at our final chapter meeting of the year on April 21st at Rock Garden in Green Bay. We have another great program lined up!

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



February 17th Chapter Meeting Photos:

(Pictured top left) Associated Financial Group presented a panel discussion addressing the future of executive compensation. Featured left to right are Jeff Bartosic, Bob Riolo, Mardi Burns, Mike Shlensky, Moderator, Bret McKittrick, and Case Study Interviewer, Linda Evans of Douglas Dynamics.

(Pictured top right) George Kelly of Experis and Keynote Speaker, Jeff Joerres, Executive Chairman of ManpowerGroup.

(Pictured bottom left) Nick Guerrieri and former Chapter Administrator, Patti Ayala during her recognition at the Business Meeting.

(Pictured bottom right) Keynote Session Attendees.



March 18th Chapter Meeting Photos:

(Pictured top left) Kurt Johnson, Julie Kimps and Sue Guyette of Right Management, and John Hainaut of Experis. Kurt and John were the featured Professional Development Speakers and gave separate presentations on Trends in Talent Management and Cyber Threats respectively.

(Pictured top right) Attendees during the Professional Development Session.



(Pictured above)

Jim Ostrom giving his Keynote Speaker Presentation on the dairy industry and Milksource's Large Scale and Sustainable Approach.

(Pictured above)

Event signage at Bridgewood Conference Center in Neenah.

(Pictured above)

Jim Ostrom, Partner, President & CEO of Milksource LLC, during the Social with Karen Vanderwall. Karen is an FEI Member and the CFO at Milksource.

Save the Date Reminders

Career
Management
Seminar

2015 FEI Career Management Workshop

Thursday, May 14, 2015
Bridgewood Conference Center
Neenah, WI, 8:30 am – 4:30 pm
Event flyer will be released shortly

The seminar will be presented by senior consultants from Right Management, a unit of the ManpowerGroup. Six 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 flyer will be released shortly



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), Joe Topp (joseph.topp@francisinvco.com), Diane Roundy (diane.roundy@schencksc.com), or Peter Kerwin (pjknd84@yahoo.com).

April
Chapter
Meeting

TUESDAY
April 21, 2015

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 & Student
Achievement Awards

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

REGISTER BY

April 14, 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
Friday, April 17, 2015.

FEES

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

Keynote Speaker Presentation



- Kate Burgess -

CEO, Elevate97

**Topic: Transformation Through Rapid
Growth: The Elevate97 Story**

Elevate97 shows off brands. Anywhere. Anyhow. And that's just the way Kate likes it. As CEO and owner, Kate describes what her company does by saying, "We elevate brands. Think little boxes to big buildings. We show off world renowned retail brands like TaylorMade, Nautica, Pandora Jewelry and the Green Bay Packers."

What started in a garage is now a 190,000 square foot facility of innovation and brand elevation in Green Bay, Wisconsin. Elevate97 partners with over 200 clients and produces and distributes over 40 million pieces of marketing magic every year.

Kate drives growth and commitment to partners through her own deep belief in elevating those around her—and having a darn good time along the way! She and her company, formally known as Fulfillnet, have come a long way since she and her husband, Tom, pushed a borrowed hotel cart filled with marketing ideas up and down Madison Avenue. "It's the relationship we have with our partners from Madison Avenue to right here in Green Bay that has grown the company," she says. And that growth has resulted in revenues increasing over 450%, with a 250% increase last year alone.

Kate brings together aspects needed to elevate world renowned brands in homes, businesses and storefronts around the globe. The company started in the fulfillment, warehousing and pick-pack ship industry but has significantly expanded. This expansion, driven by her desire to meet the full needs of her clients, led her to purchase a local printing company that now allows her organization to offer traditional and digital printing and large format environmental graphics that bring brands to life—sometimes larger than life!

And if the service doesn't exist yet, Kate asks how her company can create a way to fill her clients' unmet needs. That kind of innovation led to the creation of a proprietary software called ShopDev that manages the ordering and distribution of marketing assets for retail giants like Phillip-Van Heusen and its brands like Calvin Klein.

Understanding the importance of community engagement, Kate has established three pillars for her company that she asks all employees to uphold: fun, innovation and personal responsibility. The pillar of personal responsibility speaks to her desire for each person to work toward improving their teams, their company, and their community. To that end, the company participates in Habitat builds, clothing drives and fundraisers for those in need. The company is also a frequent sponsor of such events as the St. Norbert College Girls in Leadership (GLAD) Camp and donates time and materials for events such as the Business in Ethics Awards hosted by the American Foundation of Counseling Services, or enrollment initiatives for local schools.

(continued on following page)

Keynote Speaker Presentation (Continued)

The company's growth and transformation also led to a company rebrand and name change. Kate will share how the focus on the company's brand started by listening to employees—or as she says, her internal partners and brand ambassadors.

Previously, Kate worked for Anchor Food Products (now part of McCain Foods) where she served as Vice President of Human Resources. Before that, she held roles as the Regional Sales Manager, Director of Marketing and National Sales Trainer. It was as a sales trainer, traveling across the country in a customized semi-truck with her husband launching products at retailers that a big idea struck. She and Tom realized there was a business opportunity in improving how companies provide sales locations with marketing support materials.

Today, Kate's passion for elevating brands is as strong as ever as she reflects on the power of her own company's brand—and staying true to its core and its people. Kate was born and raised in Glenbeulah near Elkhart Lake, Wisconsin and is the youngest of five children. Kate resides in De Pere, Wisconsin and is the proud mom of Emily, Madalyn and Ben who elevate her each and every day.

Education, Community Engagement & Awards

Marquette University, B.A.

Board of Directors, Women's Fund, 2008-Present

Committee Chair, Women's Fund Friendraiser Committee, 2008-Present

Board of Directors, Boys & Girls Club, 2007-Present

Committee Chair, Boys & Girls Club Wine & Cheese Committee, 2010-Present

Vice President & Advisory Board, East High School Institute of Fine Arts

Fund Development, UWGB/TaylorMade Pro-Am Golf Tournament

2013 ATHENA Award, Green Bay Area Chamber of Commerce

2013 Clara Barton Award, American Red Cross

2013 Board Member of the Year, Boys & Girls Club

Professional Development Session

Presented by Mason Wells

Topic: Case Studies in Private Equity and the Role of the CFO



- Jay Radtke -

Managing Director

As a Managing Director of Mason Wells Buyout Funds, Mr. Radtke is primarily responsible for supporting the investment and portfolio development activities of those funds. In this capacity, Mr. Radtke is responsible for initiating investment opportunities, conducting due diligence, negotiating debt financings, serving on the Board of Directors of portfolio companies and working with portfolio company management teams.

Mr. Radtke has over 15 years of private equity investing experience in middle market companies. Prior to joining Mason Wells in 2006, Mr. Radtke worked for Cornerstone Equity Investors, LLC in New York for five years, where he was responsible for the origination, analysis, due diligence and execution of control-oriented investments in middle market companies in the business services and specialty manufacturing industries. Prior to Cornerstone Equity Investors, Mr. Radtke worked in Lehman Brothers' New York office for three years, where he was an Investment Banking Analyst in the real estate and mergers and acquisitions groups.

Professional Development Session (Continued)

Mr. Radtke is currently a member of the Board of Directors of Coating Excellence International LLC, Mullinix Packages, Inc., and Nelipak Healthcare Packaging. A native of Wisconsin, Mr. Radtke received a Master of Business Administration Degree from Columbia Business School and a Bachelor of Arts Degree from Vanderbilt University.



- Ben Holbrook -
Managing Director

As a Managing Director of Mason Wells Buyout Funds, Mr. Holbrook is primarily responsible for the investment and portfolio development activities of those funds. In this capacity, Mr. Holbrook is responsible for initiating investment opportunities, conducting due diligence support, negotiating debt financings, serving on the Board of Directors of portfolio companies and working with portfolio company management teams.

Mr. Holbrook has over 17 years of financial services experience. Prior to joining Mason Wells in 2005, Mr. Holbrook served as a Research Associate at Janney Montgomery Scott in Philadelphia, where he was principally responsible for equity research coverage of the Information Security sector.

Mr. Holbrook serves on the Board of Directors of A&R Logistics, Inc., Eddy Packing Co., Inc., and Whitehall Specialties, Inc. He also serves on the Board of Directors of The Betty Brinn Children's Museum.

Originally from Wisconsin, Mr. Holbrook received a Bachelor of Science Degree with Honors in Psychology from Brown University. He also attended Harvard Business School and completed the Advanced Management Program. Mr. Holbrook competed in the 2004 Olympic Games in Athens, Greece as a member of the United States Olympic Rowing Team.



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.

April 21, 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.

2015 LEADERS FORUM IN NEENAH

Join area business leaders for a half-day summit designed to inspire and empower you.

Agenda

8 – 8:30 a.m.
Event registration,
networking and
continental breakfast

8:30 – 10 a.m. Keynote
speech by Joseph Grenny,
author of “Crucial
Conversations”

10 – 10:15 a.m.
Break for networking

10:15 – 11:45 a.m.
Breakout sessions

Save the date

Wednesday, April 29, 2015
Bridgewood Conference
Center
1000 Cameron Way
Neenah, WI 54956

Leverage crucial conversations. Lead your business to success.

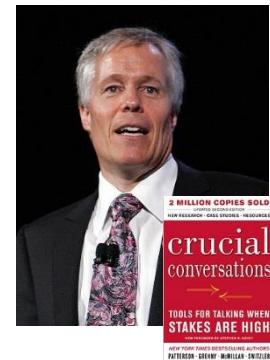
When you are stuck in any situation — whether it’s at home or work — there is a crucial conversation keeping you from accomplishing the desired results. If you can learn to handle these crucial moments effectively, then you can accomplish the results you are after. The productivity of your people and the success of your business depend on your successful navigation of these high-stakes situations.

The author of “Crucial Conversations” and other bestsellers, Joseph Grenny, will reveal skills and strategies in his keynote presentation that are easy to learn but surprisingly rare in corporate America.

Meet Joseph Grenny

Mr. Grenny is an acclaimed keynote speaker and leading social scientist for business performance. He has shared the stage with Jack Welch, Colin Powell, Jim Collins and Daniel Pink at some of the world’s premier leadership conferences and organizations.

Mr. Grenny was named an Ernst & Young Entrepreneur of the Year for his work in founding the corporate training and leadership development company VitalSmarts, which has been ranked nine times by Inc. as one of the fastest growing companies in America.



Breakout sessions

Creative benefit strategies after healthcare reform

Now that most of the major healthcare reform implementation dates have begun, this is a good time to sit back and think about other creative opportunities that may help cut costs and improve employees’ health and wellbeing. During this session we’ll discuss several ideas that may enhance your benefits strategy.

Cyber attacks and data breaches: Critical conversations for your leaders

The potential of risks associated with the digital realm require leaders at all levels to proactively implement safeguards to protect their organizations and themselves. The blame and liability reaches up to executives and even board members for not anticipating, preparing, planning for or preventing these attacks. We will examine the current trends, uncover where many claims are coming from and discuss who may be held liable when faced with a breach.

Register today to reserve your seat

Register online at:

www.AssociatedFinancialGroup.com/LeadersForumWI or,

call us at 800-258-3190.



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Please join The Diversity Group for its final event of fiscal year 2014-2015! Details and registration information are located below.

May 19, 2015 Diversity Group Breakfast Event



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.

Topic

Trisha will be sharing her journey with Winsert, and the several guiding principles developed which have led to its success today. She will also discuss the differences between men and women, and managing and engaging millennials.

This event is free and breakfast will be served. Additionally, the Diversity Group Breakfast is eligible for 1 CPE Credit for those that attend the event. Pre-registration is required.

[Please click here](#) to register today!

What is the FEI Diversity Group?

FEI National continues to encourage local chapters to focus on diversity within our membership. Women executives face a unique set of challenges in balancing their careers and personal lives. This special interest group is focused on exploiting the talents of individuals and creating opportunities to improve personally and professionally. As a result, we hope to increase membership in our chapter and create additional ways for our female members to be engaged in the FEI experience.

This Diversity Group event is 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
- Guests of any of the above



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



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May 19, 2015 Diversity Group Breakfast Event: Instructional Method: Group-live **Experience Level:** Basic **Prerequisites / Advance Preparation:** None **Field of Study:** Personal Development; **Recommended CPE Credits:** 1.0.

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.

Membership Update

We need your recruitment help! This is a challenging year for membership as recruitment has decreased and severances have increased in comparison to previous 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 at all. We currently have two members who have joined during this promotion and there are two more candidates that are considering joining our Chapter.

If you know someone who would benefit from an FEI membership please contact them. If they have some interest please reach out to me and I will be happy to follow up from there. Thanks for all your continued recruitment efforts, especially to the members and strategic partners listed in the right-hand column.

Finally, thanks to everyone completing our monthly chapter meeting surveys. 67% of the members and strategic partners who have attended our first six meetings have completed the surveys. This is fantastic and we ask for your continued cooperation! Your input is invaluable. Through the first six 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, April 15 and Wednesday, May 20, 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 March 23, 2015: 220

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 (GT)

SILVER RECRUITERS

Two Members

Fred Bowes

BRONZE RECRUITERS

One Member

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

Please Welcome Our Newest Chapter Member!

BARBARA KANE
Director of Finance
FSCC Sponsored
Ministries, Inc.
Manitowoc
Recruiter: Fred Bowes



Money Back Guarantee!

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.

2015 SUMMIT

LEADERSHIP CONFERENCE

Financial Executives International

May 17 - 19 | Florida
Boca Raton Resort and Club



LEADERSHIP ♦ TRUST ♦ EXECUTION

**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



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

Join us for our next meeting on Thursday, May 21, 2015!

Time: 2:00 – 4:30 PM. Location to be announced shortly.

Do you want to know what other finance departments are doing for the Affordable Care Act and Cybersecurity risks, what they are seeing in new insurance rates and coverages, the latest trends in line of credit rates and terms? You make the agenda! Join us!

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

<ul style="list-style-type: none"> • Human Resources: <ul style="list-style-type: none"> - HR Policy Manuals - Employee Benefit Statement • Administration: <ul style="list-style-type: none"> - Cell Phone Usage Policy: <ul style="list-style-type: none"> ➢ 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: <ul style="list-style-type: none"> - 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: <ul style="list-style-type: none"> - Internal IT department structures versus external IT vendors. 	<ul style="list-style-type: none"> • Insurance: <ul style="list-style-type: none"> - Wellness Programs <ul style="list-style-type: none"> ➢ 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: <ul style="list-style-type: none"> - Does your company offer a Profit Sharing Plan or 401K Plan with a match? <ul style="list-style-type: none"> ➢ 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: <ul style="list-style-type: none"> - Highlights and lowlights of recent income or sales tax audits - State Nexus issues - Tax Trends • General: <ul style="list-style-type: none"> - Business risks, does anyone define and actively manage? - Economic outlook and general business climate
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**2014-2015
Chapter
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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
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