



January/February 2017 Membership Update

We could really use your help with recruiting. We have had 14 member terminations since July 1, 2016. These are primarily members who have not been able to attend our chapter functions. The best way to recruit new members is through personal contact.

The National dues have been \$525.00 annually for the Executive Membership Category. It was announced at the Summit in May that the FEI National Board approved reducing these dues to \$399.00 from June 1, 2016 through June 30, 2017, for the **first year of membership**. They support the advocacy for all financial professionals. In addition, they provide resources for research and a forum for sharing knowledge.

The local chapter fees are \$200.00 annually and they cover the seven professional development sessions and pre-dinner speakers, dinners and beverages. At approximately \$7.00 per hour (based on Chapter fees) it is very inexpensive CPE. In order to give new members a break, they are not billed the chapter fees until the beginning of their second year of membership. In summary, the first year fees are \$399.00 in total for those who join during the period noted above!

Please reach out now to fellow financial professionals you know, who you think may benefit from an FEI membership, and invite them to our next two monthly meetings on Tuesday, February 21 and Tuesday, March 21, 2017. These will both be special events and the details can be found using the link on the home page for this newsletter under "2016-2017 Program Schedule". There is no cost for them to attend and it is an excellent opportunity to expose them to our chapter's value proposition. With our Money-Back Guarantee (see below) they have nothing to lose!



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Membership & Retention Chair
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MEMBERS AS OF THE END OF COMPETITION OR FISCAL YEAR:

2008	107	2009	119
2010	139	2011	170
2012	199	2013	210
2014	226	2015	219
2016	216	2017	230 (GOAL)

Members as of
January 23, 2016: **213**

Due to terminations and transfers,
our chapter goal is to add
30 NEW members this fiscal competition year
ending March 31, 2017.

MEMBERSHIP RECRUITERS FOR 2016-2017 COMPETITION YEAR

GOLD RECRUITERS

Three or More Members

SILVER RECRUITERS

Two Members

Bob Faulds (Baker Tilly Search & Staffing)
Denise Kitzerow
Mike McNamara

BRONZE RECRUITERS

One Member

Howard Bornstein
Nick Guerrieri
Barry James
Terri Towle
Adam Wunderlin

Please Welcome Our Newest Chapter Member!

JAY EDWARDS, CPA

Director of Finance
Foth & Van Dyke, LLC
De Pere
Transfer in from
Milwaukee Chapter



MONEY- BACK GUARANTEE

In order to support our recruitment efforts this fiscal year, the chapter Board has 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. Any new members whose applications are processed from July 1, 2016 through June 30, 2017, and who join the Northeastern Wisconsin Chapter, are eligible for this money-back guarantee.
2. Members who transfer in from or out to other chapters are not eligible.
3. The members must have attended at least four of the featured speaker presentations during the first 12 months of their membership.
4. As proof of their attendance, members must sign in and sign out on the attendance sheets for each meeting.
5. 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.
6. 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.
7. In the event of any questions or disputes in administering this money-back guarantee, Mike McNamara will have sole authority to resolve the situation.
8. The effectiveness of this offer will be evaluated toward the end of the 2016-2017 fiscal year to determine whether to continue it for future years.
9. 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. Any new members whose applications are processed from July 1, 2016 through June 30, 2017, and who join the Northeastern Wisconsin Chapter, are eligible for this money-back guarantee.
10. Members who transfer in from or out to other chapters are not eligible.
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13. 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.
 14. 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.
 15. In the event of any questions or disputes in administering this money-back guarantee, Mike McNamara will have sole authority to resolve the situation.
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Member Benefits: Getting to Know Your FEI

This webcast will give you in-depth insights into your FEI membership benefits and career service offerings as well as updates on technical committee activities, and new research efforts from FERF (Financial Executives Research Foundation). One of our National Board Directors will welcome our newest members. We encourage all members to participate in one of these webcasts. **The dates for the next two webcasts are Wednesday, February 22 at 12:00 p.m. CT and Wednesday, March 22, 2017 at 1:00 p.m. CT. Please note the starting time difference between both months.** To register for the webcast, go to www.financialexecutives.org and click on “Events” and then “Webinars” to register. If you have any questions about this webcast, please feel free to contact Mike McNamara.