



## March/April 2017 Membership Update

**We could really use your help with recruiting!** We have had a net decrease of seven members since June 30, 2016. This is driven by 26 members who have not renewed their membership. They are primarily members who have not been able to attend our chapter functions. Our fiscal year ends June 30, 2017 and we would really like to at least “breakeven” which means we need to have a **net** increase of seven members by then. We currently have four prospects who have indicated they are probably going to join which is a good start toward meeting this goal.

It was announced at the Summit last May that the FEI National Board approved reducing the National dues for Executive members from \$525.00 to \$399.00, from June 1, 2016 through June 30, 2017, for the **first year of membership**. The local chapter fees are \$200.00 annually and they cover the seven professional development sessions and pre-dinner speakers, dinners and beverages. 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!

The best way to recruit new members is through personal contact. 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, March 21 and Tuesday, April 18, 2017. These will both be great programs 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!

**Mike McNamara**  
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	216	(REVISED GOAL)	

Members as of  
March 13, 2017: **209**

Due to higher than normal terminations we have revised our goal to end the fiscal year on June 30, 2017 at breakeven from a membership standpoint.

### 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

Howard Bornstein  
Jim Gallimore (BMO)  
Nick Guerrieri  
Barry James  
Jim Kiekhaefer  
Terri Towle  
Adam Wunderlin

# Please Welcome Our Newest Chapter Members!

**JOEL KAEPLER,  
CMA**  
Vice President  
Stecker Machine Co., Inc.  
Manitowoc  
Recruiter: Jim Gallimore  
(BMO)

**NO IMAGE  
AVAILABLE**

**JAMES LEVASH**  
Controller  
Hilbert Communications  
Green Bay  
Recruiter: Jim Kiekhaefer



## 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](mailto: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](mailto: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.
  16. 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.
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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, March 22, 2017, and Wednesday, April 19, 2017, both at 1:00 p.m. CT.** To register for the webcast, go to [www.financialexecutives.org](http://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.