

**Northeastern Wisconsin
Chapter Newsletter
April/May 2014**



1st Place Winner!
**2012-2013 FEI National
 Member Development Award**
7th Consecutive Year!
 AND
**2012-2013 FEI National
 Chapter Achievement Award**

**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
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2013-2014 CHAPTER PROGRAM SCHEDULE

Date/Location	Professional Development	Keynote Speaker
Tuesday, September 17, 2013 Bridgewood Resort Neenah, WI	Social Media: Be Aware or Beware Paul Rozek & Debra Pagel – Schenck, SC	Bob Pedersen, President & CEO Goodwill Industries of NCW
Wednesday, October 16, 2013 Bridgewood Resort Neenah, WI	Keeping Your Company Out of the Headlines: Fraud Awareness and Fraud Risk Paul Rosol – Experis Finance	Lori Lutey, Executive VP & CFO Schneider National, Inc. - <i>The Big Orange Approach to Enterprise Risk Management</i>
Monday, November 18, 2013 St. Norbert College De Pere, WI	Tax Update Wipfli and Godfrey & Kahn	David Obey, U.S. Congressman - Retired <i>The State of American Politics and What it Means to the Country</i>
Tuesday, January 21, 2014 St. Norbert College De Pere, WI	Francis Investment Counsel Globalization & Inflation: Themes that are changing the investment paradigm	Mike Haddad, President & CEO Schreiber Foods, Inc.
Tuesday, February 18, 2014 St. Norbert College De Pere, WI	2014 Risk Update: Insights for Decision Making Panel Discussions Aon Risk Solutions	William Strauss, Senior Economist Federal Reserve Board of Chicago
Tuesday, March 18, 2014 Bridgewood Resort Neenah, WI	International Opportunities – Panel Discussions Associated Bank and Baker Tilly	Jeff Cheney, CFO Kohler Co. <i>Business Case for International Growth</i>
Wednesday, April 16, 2014 St. Norbert College De Pere, WI	M&A Financial & Tax Due Diligence Mason Wells and Grant Thornton	Don Robillard, SVP & CFO Hunt Consolidated, Inc. <i>A Private Company's Role in the 21st Century Energy Business</i>

Diversity Group Events

Thursday 9/26/13
 Wednesday 12/4/13
 Wednesday 2/26/14
 Wednesday 4/30/14
 Wednesday 6/4/14

Peer Group Meetings

Thursday 8/22/13
 Thursday 11/21/13
 Thursday 2/27/14
 Thursday 5/22/14

Golf Outing & Social Event

Monday 9/9/13

It is amazing how quickly a year can pass; that is not to say that the respective seasons pass in similar fashion! Winter weather advisories on April 15th! For Northeastern Wisconsin FEI a year is made up of:

Chapter President's Message

- Seven chapter meetings attended by an average of 90 members, prospective members and partners;
- Five diversity group events;
- Four peer group meetings; and
- At least one golf outing/social event.

That's seventeen opportunities for chapter member interactions.

We just held our seventh and final chapter meeting of the fiscal year and I'm proud to have played a small part in it. I've mentioned it in the past but it bears repeating; behind the scenes there are many people and activities that make these events possible. Regular executive committee conference calls, quarterly board of directors meetings, annual strategic planning sessions and follow-up activities, annual program planning sessions and innumerable member support efforts each day. I mention this for two reasons; 1.) To recognize the time that all of our volunteers put in and say "thank you" and, 2.) To tell you that it all happens in an organized and pretty seamless fashion. I highly encourage you to get involved, it is quite rewarding.



Think Spring!

Nick Guerrieri
2013-2014 Chapter President
nick.guerrieri@ki.com

Photos from the March 18th Chapter Meeting. Keynote speaker Jeff Cheney, retired CFO of Kohler Co. (pictured far left) provided insights into Kohler's international operations. The professional development session also followed the theme of international opportunities, presented by Baker Tilly and Associated Bank. Pictured at the top from left to right are Richard Shapland and Adam Grinde of Baker Tilly, and Stephen Tramp of Associated Bank. Bottom right is Richard Shapland of Baker Tilly and bottom center is Paul Everson of Associated Bank.



Membership Update

Our membership competition year ended March 31, 2014. The 24 members and four strategic partner representatives in the right-hand column recruited 38 new members (including three reinstatements). This is the most we have ever had in a year. This is

outstanding and we all owe them a huge thank you for their contributions to grow OUR Chapter!

Even though our competition year just ended, it does not mean we relax our recruitment efforts as it is a year-round process. Please keep this in mind as you make contacts with fellow professionals, bankers, attorneys, insurance brokers, etc.

We have found the best way to recruit a new member is through personal contact. Please pick up the telephone and make that call now! With our money-back guarantee (see below) and our waiver of Chapter membership fees for their first year they have nothing to lose. If you need assistance with your recruiting, just contact me and I will be happy to follow up with your prospect to explain the details of membership, operation of the Chapter, National organization, dues, etc.

Mike McNamara
Membership & Retention Chair

Mike.McNamara@tqmillwork.com
(920) 533-4860, extension 222 (office)
(920) 539-1255 (mobile)



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. CDT.

The dates for the next webcasts are **Wednesday, May 21** and **Wednesday, June 18 at 1:00 p.m. CST**. To register for the 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	235 (GOAL)

Members as of 02/24/14: 226

Due to terminations and transfers, our Chapter goal is to add **40 NEW members** this fiscal competition year ending March 31, 2014.

MEMBERSHIP RECRUITMENT FOR CURRENT COMPETITION YEAR

GOLD RECRUITERS

Three or More Members

Mike McNamara
Paul Belschner

SILVER RECRUITERS

Two Members

Howard Bornstein
Scott Dell
Jacqui Engebos
Julie Kimps (Experis Finance)

BRONZE RECRUITERS

One Member

Tom Adrians	Fred Bowes
Carl Buchinger	Richard Dannhausen
Kurt Gresens (Wipfli)	Barry James
Jim Kiekhaefer	Ken Larsen
Kevin Larsen	Mary Meixelsperger
Linda Nila	Dan Pichler (Wipfli)
Tom Rettler	Larry Romuald
Carl Rudolph	Greg Sofra (Baker Tilly)
Doug Stecker	Joan Strand
Terri Towle	Shanna Zahn
Paul Van Vreede	Joe Zimmer

Please Welcome Our Newest Chapter Member!

LINDA SPRINGER

Senior Manager – Finance & Accounting
Airadigm Communications
Green Bay
Recruiter: Barry James

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, 2013 through June 30, 2014, 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 2013-2014 fiscal year to determine whether to continue it for future years.

**Money
Back
Guarantee!**

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.

LOOKING FOR YOUR CPE CREDITS? START HERE:

Log in to www.financialexecutives.org and click the “cpe” tab.

The screenshot shows the FEI (Financial Executives International) website. The header includes the FEI logo and navigation links: Home, About, Advertising & Sponsorship, and Join FEI Now. A search bar is also present. The main navigation menu includes: about, membership, communities, news & publications, cpe, events, advocacy, research, career center, and knowledge center. The 'cpe' tab is selected, leading to the 'cpe courses and credits' page. The page content includes a 'CPE Center' section with a description of the service, a 'What would you like to do?' section with links to 'Set up CPE profiles' and 'Track non-FEI CPE credits', and a 'To receive CPE credit and certificate of completion, you must:' section with a link to 'Complete a program evaluation for live events'. On the right side, there is a 'My FEI' section with a welcome message to Patti Ayala and links to 'My Information', 'Subscriptions', 'Chapter Packages', and 'Member Directory'. There are also links for 'Log out' and 'Change Login'. At the bottom right, there is a 'STRATEGIC PARTNERS' section featuring a 'Member FDIC' badge and a 'UnionBank' logo.



Sharon K. Hulce, President and CEO of Employment Resource Group, Inc.

will be our guest speaker at the Diversity Group breakfast meeting on Wednesday, April 30th from 7:45 AM to 9:15 AM at the Bridgewood Resort in Neenah.

**Diversity
Group**

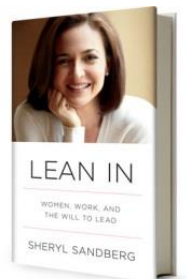
Sharon's presentation will be based on her book, *A Well Done Professional Mid-Life Crisis*, which is about getting back the passion and energy in your career you once had. Is it hard to go to work, knowing you will be doing the same work you have done for years? If you were to ever change jobs, how would you do so, knowing you are in your peak earning years and you may have to earn less? If you do decide to do something different, how do you decide where to start your search? Sharon will take you through steps to discover your passions and either think about doing something new or infusing energy and passion back into your daily professional lives. Sharon has 20 years of expertise in executive search specializing in sourcing outstanding leaders. Employment Resource Group believes a business and community's most valuable asset is the people within. This is a free event and breakfast will be served.

[Click Here to Register for the April 30th Diversity Group Event](#)

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.

The Diversity Group is also recommending a new book: *Lean In: Women, Work and the Will to Lead* by Sheryl Sandberg.

The Book Club review is scheduled for Wednesday, June 4th at 7:30 a.m. over coffee at Chocolate & Coffee Bistro, 819 Schelfhout Lane #108, Kimberly, WI 54136. You can find the book at <http://leanin.org/book>.



In response to Sheryl's 2010 TEDTalk on the ways women are held back—and the way we hold ourselves back—viewers around the world shared their own stories of struggle and success. This overwhelming response inspired Sheryl to write this book. In *Lean In*, she shares her personal stories, uses research to shine a light on gender differences, and offers practical advice to help women achieve their goals. The book challenges us to change the conversation from what women can't do to what we can do, and serves as a rallying cry for us to work together to create a more equal world.

[Click Here to Join the Book Club](#)



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

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.

Next Meeting Thursday May 22, 2014

2:00-4:30 PM at Wisconsin Wireless Communications

2305 Kelbe Drive, Little Chute WI 54140

[Click Here to Register!](#)



Denise Kitzerow

Peer Group Chair

dkitzerow@lakesidefoods.com

We keep the discussions *confidential* so that participants can feel free to get into 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. 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 |
|--|---|

2014 LEADERS FORUM

We invite you to join local 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
Josh Linkner

10 – 10:15 a.m.

Break for networking

10:15 – 11:45 a.m.

Breakout sessions

Save the date

Northeast Wisconsin
Tuesday, May 13, 2014
Bridgewood Conference
Center
1000 Cameron Way
Neenah, WI 54956

Ignite your creativity. Lead your business to success.

The best companies have a systematic process to focus their team's creativity into practical outputs — something our keynote speaker and New York Times bestselling author, Josh Linkner, discovered by founding and building companies that collectively sold for over \$200 million.

His inspiring presentation will deliver practical tools that you can use immediately to increase creative output and deliver innovation and bottom-line results.

About our keynote speaker: Josh Linkner

Josh Linkner is founder and chairman of ePrize, a dominant player in the promotions industry serving 74 of the top 100 brands. He is a four-time entrepreneur, venture capitalist and accomplished jazz musician. He has won several business, technology and design awards, including the Ernst & Young Entrepreneur of the Year Award, Crain's 40 under 40, Automation Alley's CEO of the Year and the Detroit Executive of the Year.



About our breakout sessions

Healthcare reform: New developments and evolving strategies for 2014

Our presenters explain the strategic planning initiatives employers should be undertaking with their benefits advisors in the upcoming months, discussing healthcare reform obligations and choices regarding plan design and benefit offerings.

Creative strategies for controlling your employment practices liability

Preventative measures can minimize or even eliminate employment practices liability (EPL) claims. Our presenters will discuss the top EPL claims and creative strategies to avoid these claims.

Register today

Register online at AssociatedFinancialGroup.com (click Leaders Forum) or call us at 800-258-3190 to register for this complimentary event.

*Please see reverse side for important
disclosure information >>*



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amazing savings!

For information about exhibit or sponsor opportunities, please contact contact Bonnie Rhodes.

brhodes@financialexecutives.org | 973.756.1067



Summit Hill Day

WEDNESDAY, JUNE 4 | 7:00 am - 4:00 pm

Visiting with your members of Congress is an effective way to keep lawmakers informed of the important issues facing senior-level financial executives and their companies. As Congress continues to debate the budget, spending, and tax reform, as well as financial and regulatory matters, your Congressional representatives need to hear from you.

Take advantage of the 2014 Summit Leadership Conference's proximity to Capitol Hill and join FEI's government affairs department and your colleagues for the Summit Leadership Conference Hill Day. Keynote speakers and FEI staff will help prepare you for visiting with your members of Congress. The government affairs staff will schedule appointments to meet with your Senators and Representative and will accompany you during your time on Capitol Hill.

AGENDA

7:00 am - 7:30 am	Registration
7:30 am	Buses Depart for PwC Offices
8:00 am - 10:00 am	Continental Breakfast, Welcome Remarks and Legislative Briefing
10:00 am	Buses Depart for Capitol Hill
10:30 am - 4:00 pm	Congressional Visits
4:00 pm	Buses Depart for National Harbor

This exciting event is complimentary to all Summit attendees; however a separate registration is required. Should you have any questions or concerns, please contact **Karen Lapsevic**, Director, Government Affairs, via email, klapsevic@financialexecutives.org, or phone, 202.626.7809.

summit.financialexecutives.org

THURSDAY, JUNE 26



Northwestern Kellogg School of Management and the FEI Chicago Chapter Professional Development Program

On Thursday, June 26, the Chicago Chapter will hold a full day Professional Development program at Northwestern University's Kellogg School of Management. All sessions will be held at the James Allen Center, Kellogg's state of the art executive training facility on Northwestern's Evanston campus. Classes will be taught by outstanding Kellogg professors.

A four hour morning session will be taught by Harry M. Jansen Kraemer, Clinical Professor of Management and Strategy. Harry's topic will be "Values Based Leadership: Going From CFO to CEO." Harry is an executive partner with Madison Dearborn and a former CFO, CEO and Chairman of Baxter International. Members who attended the Chapter dinner meeting in January, 2012 got a taste of Harry's valuable insight and called for more. This extended format will provide an opportunity to explore the subject in greater depth.

A three hour session in the afternoon will feature Leigh Thompson, the J. Jay Gerber Professor of Dispute Resolution & Organizations. Leigh's topic will be "Negotiation Strategy." This class will include "breakout" sessions in which attendees will participate in structured negotiations where they will learn to apply important principles of successful negotiation. Leigh taught this subject at a previous Chapter seminar with rave reviews.

The full day program will include continental breakfast, buffet lunch, and closing cocktail reception. Participants will also receive a copy of Professor Kraemer's book, *From Values To Action: The Four Principles of Values Based Leadership*.

When

Thursday, June 26, 2014

8:00am – 9:00am Registration and Continental Breakfast
9:00am – 1:00pm Leadership" with Professor
Harry Kraemer
1:00pm – 2:00pm Lunch
2:00pm – 5:00pm "Negotiation" with Professor
Leigh Thompson
5:00pm – 6:00pm Cocktails & Networking

Where

James Allen Center
Northwestern University, 2169 Campus Drive, Evanston
\$10 Parking Passes Available at Event

Cost

\$100 for FEI Members and Chicago Chapter
Sponsors

\$275 Guests

(Prospective members who join within 6 months will receive a free
Chicago Chapter membership, National FEI fee still required))

Questions?

Contact info@feichicago.org or 312-263-1661. To register online
click [here](#).

Or complete the form below and mail with your payment to: FEI
Chicago Chapter, 216 W. Jackson Blvd., Suite 625, Chicago, IL 60606

Name

Company

Phone

Email

FEI Member ☐ Guest ☐ Amount Enclosed: _____

FEI Chicago Chapter
216 W. Jackson Blvd., Suite 625 | Chicago, IL 60606
312-263-1661 | info@feichicago.org | www.feichicago.org

Financial Executives International...

Advancing the Success of Senior-Level Financial Executives, Their Organizations and the Profession.



FEI Canada's Annual Conference Niagara Falls, Ontario from June 4-6, 2014.

The 2014 theme **Leadership Beyond Finance** is integrated throughout the plenary and concurrent session presentations by some of industry's brightest thought leaders. Sessions include outstanding keynote presentations such as:

- Branding the CFO – **Brian Lawson**, CFO, Brookfield Asset Management and Canada's 2013 CFO of the Year, and **JP Lacroix**, President, Shikatani Lacroix
- Board Expectations of the CFO – **Maureen Sabia**, Chairman of Canadian Tire
- Innovation – **Dan Fortin**, President, IBM Canada and **Glenn Kerrick**, President & CEO, Alma CG
- Funding our Retirement – **Jim Leech**, former President & CEO, Ontario Teachers' Pension Fund, and **Bill Morneau**, Executive Chairman, Morneau Shepell

Eight content-rich concurrent sessions as well as five breakfast seminars on a range of topics of interest to CFOs and other financial executives – presented by interesting speakers such as CIBC Deputy Chief Economist **Benjamin Tal** and noted author and leadership expert **Vince Molinaro**.

Register now for the June 5-6, 2014 conference and consider the optional golf on June 4th as well as the various guest program activities. Visit the conference home page at www.feicanada.org/conference2014 for full session agenda and details. Or click here to view the conference brochure. Take advantage of the broad range of social amenities that Niagara Falls, Ontario has to offer.

The Conference will expose participants to current concepts and strategies employed by some of Canada's leading executives. As well, there will be ample time for networking coupled with an opportunity to meet some of Canada's leading companies at their booths in the exhibit hall.

2013-2014 Chapter Leaders

Contact Information

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Nick Guerrieri	President and Programs Committee Chair
Jim Kiekhaefer	President-Elect, First Vice President, VP Programs and Professional Development Committee Chair
Doug Stecker	Second Vice President & VP Membership
Martha Vandeleest	Secretary
Barb Ristau	Treasurer
Mike McNamara	Membership & Retention Committee Chair and Headquarters Liaison
Greg Williams	Past President & Nominations Committee Chair
Valorie Hamilton	Diversity Committee Chair
Denise Kitzerow	Peer Group Chair
Barry James	Sponsorship/Partner Committee Chair
William Lepley	Academic Relations Committee Chair
Scott Dell	Career Management Committee Chair
Bob Qualls	Publicity Committee Chair
Howard Bornstein	Board Member
Eileen Jahnke	Board Member

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Click on each company to visit their web site.



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