

**Northeastern Wisconsin
Chapter Newsletter
February / March 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
CONTENTS**

	<u>Page</u>		<u>Page</u>
Chapter President's Message	2	Membership	7-8
March Chapter Meeting	3-4	Peer Group	9
April Chapter Meeting	5-6	Chapter Leaders	10
Diversity Group	6	Strategic Partners	11

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	Peer Group Meetings	Golf Outing & Social Event
Thursday 9/26/13 Wednesday 12/4/13 Wednesday 2/26/14 Wednesday 4/30/14 Wednesday 6/4/14	Thursday 8/22/13 Thursday 11/21/13 Thursday 2/27/14 Thursday 5/22/14	Monday 9/9/13

**Chapter
President's
Message**

It's another frigid day as I type this and based on the trends probably another frigid day as you read this! Now might be a good time for golfers and non-golfers alike to look forward to warmer weather. Keep an eye out for future information on a chapter golf outing to take place in the summer months. Thank you to Joe Topp from Francis Investment Counsel and Peter Kerwin from Marine Travelift for agreeing to chair this event.

At our board of director's meeting on February 13th, action on several of our strategic initiatives was agreed upon. I continue to be impressed with the leadership and commitment exhibited by this group of volunteers. As I mentioned at our last chapter meeting, Jim Kiekhaefer will be hosting our 2014-2015 planning session on March 11th. Please contact Jim, me or any other board member with your ideas for professional development topics or keynote speakers that you would like us to consider and pursue. I look forward to seeing you all on March 18th when we have another great program lined up!



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



We continue to have excellent attendance at our Chapter Meetings! The January keynote speaker was Mike Haddad, President & CEO of Schreiber Foods (pictured above far left). The professional development session on globalization and inflation was presented by Edward McIlveen (pictured above right) and Kevin Roloff of Francis Investment Counsel. Chapter members enjoy the opportunity to personally interact with our guest speakers, like Fred Bowes who is pictured below left with the February keynote speaker William Strauss, Senior Economist with the Federal Reserve Board of Chicago. Aon's Vicki Missar (below left in front of the FEI banner) and Maria Harshbarger (standing below right) discussed key business risk factors.



**MARCH
Chapter
Meeting**

**TUESDAY
MARCH 18, 2014**

LOCATION

Bridgewood Resort
And Conference Center
1000 Cameron Way
Neenah, WI 54956
[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
5:45 PM – 7:30 PM
Social Period & Dinner

For this event the social period and dinner are combined. We will have pub tables for those who prefer to stand and enjoy a beverage with some hors d'oeuvres; as well as traditional dinner tables for those who wish to be seated with their colleagues. Dinner will be served buffet style.

REGISTER BY March 11, 2014

[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
payala@new.rr.com no later than
5:00 PM Friday March 14, 2014.

FEES

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

Keynote Speaker Presentation



JEFFREY P. CHENEY
Retired Senior Vice President – Finance
and Chief Financial Officer
Kohler Co.

Business Case for International Growth

Jeffrey P. Cheney joined Kohler in June 1979 and recently retired from his most recent position of Senior Vice President – Finance & Chief Financial Officer, where he was responsible for all Kohler financial, accounting, tax, and acquisition functions on a worldwide basis. Prior to that, he served as Group Controller for Kohler Plumbing North America, as well as Treasurer before being promoted to Senior Vice President - Finance in 1999. In May 2006, he was appointed to Kohler Co.'s Board of Directors.

Mr. Cheney was one of the leaders for Kohler's installation of SAP, a business enterprise system. He was also instrumental in the decision to establish shared service centers in North America, Asia, and Europe to accommodate the consolidation of a number of repetitive financial and human resource functions in order to improve efficiency and consistency of processes.

Mr. Cheney's presentation will address questions such as:

- How do US companies expand overseas?
- In planning these overseas expansions, what principles should remain the same and which ones should change?
- What investment point of view should be considered?
- What lessons were learned in this expansion that can be applied to other markets?

Professional Development Session

INTERNATIONAL OPPORTUNITIES

**A Panel Discussion Presented by
Associated Bank & Baker Tilly**

In today's ever-changing business environment, more and more companies are reaching outside the borders of the United States to further expand business operations and increase shareholder value. This panel will explore the opportunities and challenges for companies endeavoring into international business.

The panel consists of professionals experienced in international business, including risk mitigation, foreign exchange, importing and exporting, reporting and compliance, as well as cultural differences in various global communities. The panel is designed to provide a thoughtful discussion on common questions and considerations for those companies looking to explore various business opportunities internationally.

(continued on next page)

March Professional Development Session Presenters



Stephen Tramp
Market President – Fox Valley Region

Specializing in commercial finance, Market President Stephen Tramp is Associated Bank's Team Leader for Commercial Banking in the Fox Valley Region. Steve came to Associated Bank in 2010 with a wealth of experience in this field, having served the customers of First of America, Firststar and M&I banks for more than a quarter century. He holds a B.S. degree in Accounting from Northern Michigan University and has taught BAI courses in Commercial Lending. In his lending career he has worked with companies with sales from under \$1 Million to \$1.5 Billion. He is a member of the Fox Cities PAC-Finance Committee, United Way of the Fox Cities Finance Committee and volunteers for Habitat for Humanity and Rebuilding Together.



Paul Eversman
Vice President – Foreign Exchange & Trade Finance

Paul is responsible for developing foreign exchange and trade services solutions for Associated Bank's clients in the Midwest. He brings over 30 years of experience to Associated's client base. Paul served in the U.S. Army Security Agency as a German linguist and intelligence analyst in Berlin in the '70s; attended International Banking Summer School at St. John's College, Cambridge University in 1985; and, before joining Associated in 2001, managed correspondent relations with banks in Canada, Europe, Middle East and North Africa. Paul earned a BA in German and an MBA in Finance from Indiana University. He is active in the Milwaukee World Trade Association, the Madison International Trade Association and the International Credit Executives Group.



Adam L. Grinde
Partner & Firm Leader – International Services

Adam serves as the firm leader for international services. In this role, he provides oversight to strengthen Baker Tilly's international advisory offerings that helps their clients thrive in the rapid and constant change of the global economy. With more than nineteen years of audit and advisory experience, working with both domestic and multinational companies, Adam brings a valuable perspective on international growth and problem solving. He is the principal liaison connecting Baker Tilly partners with the independent member firms of Baker Tilly International, the world's eighth largest accountancy and business advisory network. Adam also serves in the assurance practice at Baker Tilly. He specializes in domestic and international mergers and acquisitions, research and resolution of complex accounting and disclosure issues, and significant project management of process improvement, business consulting, and strategy development. Adam worked internationally in Osaka, Japan for more than two years, providing technical guidance for several US GAAP reporting companies including several SEC registrants, coordinating the international execution of audits and performing extensive international due diligence in Southeast Asia, China, Europe, Japan, and the US.

Additional information about presenters, panelists and session details will be coming soon!

**APRIL
Chapter
Meeting**

**WEDNESDAY
APRIL 16, 2014**

LOCATION

St. Norbert College Bemis Center
299 Third Street
De Pere, WI 54115

[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

5:45 PM – 6:30 PM

Social Period

6:30 PM – 7:30 PM

Dinner

REGISTER BY April 9, 2014

[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
payala@new.rr.com no later than
Monday April 14th at 5:00 PM .

FEES

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

CONTACT

Chapter Administrator
Patti Ayala: payala@new.rr.com

Keynote Speaker Presentation



DON ROBILLARD

**Senior Vice President and Chief Financial Officer
Hunt Consolidated, Inc.**

***A Private Company's Role in the
21st Century Energy Business***

Don Robillard is senior vice president and chief financial officer of Hunt Consolidated, Inc., a private international company with interests in oil and gas exploration and production, refining, real estate development, private equity investments and ranching. A director of Hunt Consolidated, he also serves on the board of directors of Hunt Oil Company and is CFO of Hunt Global Partnerships.

Mr. Robillard directs the company's finance, treasury, insurance, planning and accounting functions. His duties extend to all the privately held entities of the Hunt organization. His experience with Hunt began in 1983 as the manager of international accounting. He was transferred to Yemen Hunt Oil Company where he held various management roles, ultimately becoming vice president of finance. His experiences in Yemen included his participation in bringing the first oil from Yemen on to production, the development of 12 commercial oil fields and the construction of several major new gas facilities.

Prior to joining Hunt, Mr. Robillard was affiliated with the international division of Cities Service Oil Company, where he held various supervisory and managerial accounting posts, including negotiating accounting and business projects with partners and host governments in the Far East, Middle East, Africa and South America. Don Robillard is an active member of Financial Executives International.

Mr. Robillard's presentation will include: an overview of Hunt Oil Company; characteristics of a highly successful company; "The Shale Revolution" – conventional versus unconventional resources plays; energy independence; and the FEI private company initiative.

Professional Development Session

M&A FINANCIAL & TAX DUE DILIGENCE

Presented by Grant Thornton & Mason Wells

As companies increasingly use M&A as a tool to spur growth, it is imperative for the CFO and Controllers of acquiring companies to have a solid understanding of key financial and tax due diligence best practices. There are a number of common pitfalls and red flags to be aware of during the financial and tax diligence process. During this professional development session, professionals from Grant Thornton and Mason Wells will discuss key considerations and past experiences of the financial and tax diligence process from both a buyer and seller perspective.

Learning Objectives:

Attendees at this FEI Professional Development session will learn about some strategic considerations of pursuing M&A as well as some commonly used valuation methodologies. In addition, some key financial diligence areas to be covered from a buyer's perspective will be addressed including quality of earnings, balance sheet considerations, key business drivers, net working capital and debt-like items. Certain tax diligence concepts such as pre-assessment of buyer/seller tax position, common tax due diligence considerations and quantifying the cash tax impact of an acquisition will also be covered.

(continued on next page)

April Professional Development Session Presenters



Jay Radtke
Director

Jay has 15 years of private equity investing experience in middle market companies including the last nine years at Mason Wells. At Mason Wells, Jay is primarily responsible for supporting the investment activities of the firm. In this capacity, Jay 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. Jay is a member of the Board of Directors of Charter NEX Films, Inc., Coating Excellence International, LLC, Mullinix Packages, Inc., and Nelipak Corporation. Jay received a Master of Business Administration Degree from Columbia Business School and a Bachelor of Arts Degree from Vanderbilt University. Jay is a native of Milwaukee, WI.



Christopher P. Schenkenberg
Partner, M&A Tax Services

Chris Schenkenberg of Grant Thornton's Chicago office has extensive experience working in mergers and acquisitions, conducting tax due diligence reviews for both financial and strategic clients. He also has significant technical expertise in acquisition structuring, divestiture planning and tax accounting methodologies. Schenkenberg has worked on various transactions conducting tax due diligence investigations, including domestic and cross-border transaction planning. He has been involved in a wide variety of transactions across numerous industries, ranging from \$10 million acquisitions of privately held businesses to multibillion dollar transactions involving public companies.



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.

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.



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

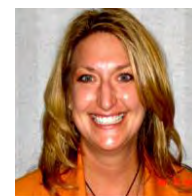
Diversity Group meetings are open to *women* who are: members of FEI NE Wisconsin Chapter; managers and executives within an FEI member's company; representatives of our Strategic Partner companies; prospective chapter members; or guests of any of the above.



The Diversity Group is also recommending a new book. *Lean In: Women, Work and the Will to Lead* by Sheryl Sandberg. You can find the book at <http://leanin.org/book>. **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.** 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

Membership Update

We ended up with ten new members as a result of the two-day special promotion by National. This was the most of any chapter in the country. We have 37 new members so far for this competition year that ends on March 31, 2014.

Thanks to all of you who are helping to spread the good word about FEI and OUR Chapter. We have had 23 members and four strategic partner representatives involved in this effort. We continue to need your recruitment help over the next month to hit our goal of 235 members by March 31, 2014. 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, March 19 and Wednesday, April 16 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: 227

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)	Jim Kiekhaefer
Kevin Larsen	Ken 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 Members!

DAVE MELLINGER

Vice President – Finance
Genex Cooperative
Shawano
Recruiter: Larry Romuald

RUSS STEINHORST

Sr. Vice President – Finance
ShopKo Stores, Inc.
Green Bay
Recruiter: Mary Meixelsperger

RONN KLEINSCHMIDT

Vice President Finance
Bay Industries, Inc.
Green Bay
Recruiter: Mike McNamara

DEBRA BERCHEM

In Transition
De Pere
Recruiter: Jacqui Engebos

TRACY HALBACH

Controller
Keller, Inc.
Kaukauna
Recruiter: Doug Stecker

JOHN McDERMOTT

In Transition
Oshkosh
Recruiter: Howard Bornstein

LYNDA PETERS

Chief Financial Officer
WOW Logistics Company
Appleton
Recruiter: Paul Van Vreede

ANTHONY ELLIS

VP, Operations Controller
Neenah Enterprises, Inc.
Neenah
Recruiter: Tom Adrians

JESSICA BROWN

Assistant Corporate Controller
Associated Bancorp
Green Bay
Recruiter: Mike McNamara

RORY FARRELL

VP Finance
Bemis Manufacturing Co.
Oshkosh
Recruiter: Kevin Larsen

THERESA LAUER

Finance Manager
Habitat for Humanity Greater
Fox Cities Area - Menasha
Recruiter: Terri Towle

JANALEE WETZEL

Controller
Lindquist Machine
Corporation - Green Bay
Recruiter: Joe Zimmer

DARIN SHERMAN

Controller
Marinette Marine Corp
Marinette
Recruiter: Shanna Zahn

SHANNON VANDYKE

VP, Corporate Controller
Menasha Corporation
Neenah
Recruiter: Tom Rettler

ROB MOORE

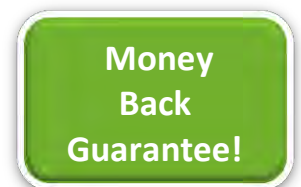
Controller
Taylor Creek, Inc.
Green Bay
Recruiters: Paul Belschner
& Greg Scanlon

DAVID HACKNEY

CFO and CCO
Sumnicht & Associates
Appleton
Recruiter: Scott Dell

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.



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.



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 (details coming soon)

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 |
|--|---|

**2013-2014
Chapter
Leaders**

Contact Information

Nick Guerrieri

Chapter President
(920) 468-2580
nick.guerrieri@ki.com

Mike McNamara

Membership & Retention Chair
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Patti Ayala

Chapter Administrator
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Web Site:

www.financialexecutives.org

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

LOOKING FOR YOUR CPE CREDITS? START HERE:

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

The screenshot shows the FEI website interface. At the top, there is a navigation bar with links for Home, About, Advertising & Sponsorship, and Join FEI Now. A search bar is located on the right. Below the navigation bar, a horizontal menu includes links for about, membership, communities, news & publications, cpe (highlighted), events, advocacy, research, career center, and knowledge center. The main content area is titled 'cpe courses and credits' and includes a 'CPE Center' section with text explaining that FEI connects members with sources for CPE credits. A 'My FEI' sidebar on the right shows a welcome message for Patti Ayala and links for My Information, Subscriptions, Chapter Packages, Member Directory, FEI Logo Products, View Directory Profile, and Leader Toolkit. At the bottom, there is an advertisement for 'ACCESS MONEY MARKET FUNDS FROM AROUND THE WORLD' by UnionBank and a 'STRATEGIC PARTNERS' section.

FEI Northeastern Wisconsin Chapter Strategic Partners

Click on each company to visit their web site.



Risk Services



Attorneys at Law



Associated Financial Group



An instinct for growth



Candor. Insight. Results.



Proven. Disciplined. Fortright



CPAs AND SO MUCH MORE



Investment Counsel, LLC



CPA's and Consultants