

Northeastern Wisconsin  
Chapter Newsletter  
June/July 2014



**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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July 1<sup>st</sup> is the beginning of our chapter fiscal year. The board, executive committee, and strategic partners have been working diligently on an exciting line up of speakers for the upcoming chapter year. Thus far we have locked in keynote speakers for 4 of our 7 chapter meetings. Our program line up will be emailed to you as soon we finalize the programs for the other 3 meetings.

**Chapter  
President's  
Message**

As you know, Chapter Administrator Patti Ayala has tendered her resignation. Fortunately she has agreed to stay on until we can find and train a suitable replacement. I use the term "suitable" lightly as I feel we will never be able to replace Patti. She has played an integral role in the success of our chapter and I personally thank Patti for her years of service. Thank you to Nick Guerrieri for agreeing to lead the executive committee in the search for Patti's replacement.

In early 2013, the board and strategic partners participated in a strategic planning session and identified several strategic initiatives. Last year, Nick Guerrieri, 2013-2014 Chapter President, led us in the effort to address a Public Relations Campaign initiative and maintain the Strategic Partner Program. Bob Qualls agreed to chair a Public Relations Committee and Red Shoes PR, a public relations agency, was identified to provide us direction. Greg Williams agreed to succeed Barry James as Strategic Partner Program chair and is working to maintain and further the program. We will continue to work on these initiatives in the 2014-2015 chapter year. Congratulations to Nick and all members for our chapter's selection by FEI National for the 2013-2014 Chapter Excellence Award in our tier size.

To further the strategic plan, the board and executive committee will again prioritize the initiatives and select additional ones for implementation in the upcoming year. We will be providing an update to you in the next newsletter.

I am excited about the new chapter year and believe we will provide members with good value in the upcoming year. I look forward to seeing you in September. I hope you enjoy the summer.



**Jim Kiekhaefer**

2014-2015 Chapter President

[Jim.kiekhaefer@bugtusselwireless.com](mailto:Jim.kiekhaefer@bugtusselwireless.com)

**Membership Update**

As I mentioned at our April Chapter meeting, I did not expect we would win the membership development award for 2013-2014. The Colorado Chapter was announced as the winner at the Summit at the end of May. After meeting and hearing their leaders at the Summit I can understand why they did. They are an excellent chapter and I feel that we can learn from them. When you look at the growth we have had, as noted in the right-hand column, we all should be very proud.

Your Chapter leadership uses the summer months to regroup and plan the upcoming year. There is not as much membership activity in the summer as we do not have Chapter meetings to attract prospective members. That being said, national has just announced they are offering a special rate for the Executive category for members who join on July 7 and 8. I will be issuing a separate message on this promotion shortly with all of the details.

Thanks again for all of your recruitment efforts for fiscal 2013-2014 and especially to the members and strategic partners listed in the right-hand column.

**Mike McNamara**  
**Membership & Retention Chair**  
[Mike.McNamara@tqmillwork.com](mailto:Mike.McNamara@tqmillwork.com)  
 (920) 533-4860, extension 222 (office)  
 (920) 539-1255 (mobile)



**Please Welcome Our Newest Chapter Members!**

**GERALD BEIERSDORF**

Green Bay  
 (Transfer in from  
 Charlotte Chapter)

**SAM HELFENSTINE**

CFO - Bauer Built, Inc.  
 Durand  
 (Transfer in from  
 Twin Cities Chapter)

**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 date for the next webcast is **Wednesday, August 20, 2014 at 1:00 p.m. CDT.** To register for the webcast, go to [www.financialexecutives.org](http://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 06/23/14: 223

Due to terminations and transfers, our Chapter goal is to add **35 NEW members** this fiscal competition year ending March 31, 2015.

**MEMBERSHIP RECRUITMENT FOR CURRENT COMPETITION YEAR**

**GOLD RECRUITERS**

Three or More Members  
 Paul Belschner  
 Mike McNamara

**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

Each year FEI recognizes Chapters that go above and beyond the ordinary. These Chapters embody all of FEI's values, and consistently raise the bar. Their professional development programs have symbolized innovation and enlightenment. They stimulate new members and revive seasoned members with excellent programming, consistent and effective communications and real engagement opportunities through volunteer committee functions.

## At FEI's 2014 Leadership Summit in National Harbor, MD on May 31<sup>st</sup>, the FEI NE Wisconsin Chapter was awarded the 2013-2014 Chapter Excellence Award!

This award would not be possible without the support and participation of **all our exceptional members!** The winners in each Tier (our chapter is Tier IV, 200-299 members) were determined by responses to the Chapter Satisfaction Survey which was sent to all FEI members in March. Your survey responses resulted in this award and, more importantly, are an indication that you believe our Chapter is moving in the right direction.



**Our sincere thanks to all the volunteer board members, to our strategic partners, and to our valued members, for making this a truly Excellent Chapter.**

Pictured above accepting this outstanding recognition on behalf of the FEI NE Wisconsin Chapter are (left to right) Doug Stecker, Mike McNamara and Jim Kiekhaefer.

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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.



Mark your calendar for September 9th, 2014 from 2:00 to 5:00 at the Performing Arts Center, Appleton.

Alison Levine

Team Captain of the First American Women's Everest Expedition and Author of the New York Times Best-Seller On the Edge: The Art of High-Impact Leadership



One of the most in-demand keynote speakers, Alison is a polar explorer and mountaineer who has survived sub-zero temperatures, hurricane force winds, sudden avalanches...and a career on Wall Street. Her first book, On the Edge: The Art of High-Impact Leadership was released in January, 2014.

Additional details and registration coming soon!



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

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.



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.

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.

2014-2015 Meeting Dates:

- August 26, 2014
November 6, 2014
February 26, 2015
May 21, 2015

All meetings are from 2:00-4:30 PM. Location to be announced.



Denise Kitzerow
Peer Group Chair
dkitzerow@lakesidefoods.com

# Save the Date!



## Chapter Golf Outing & Social Event Monday, September 8, 2014 Butte des Morts Country Club

**Details coming soon.**

### 2014-2015 Chapter Leaders

#### Contact Information

##### **Jim Kiekhaefer**

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##### **Mike McNamara**

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##### **Patti Ayala**

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##### **Web Site:**

[www.financialexecutives.org](http://www.financialexecutives.org)

Jim Kiekhaefer	President and Programs Committee Chair
Doug Stecker	President-Elect, First Vice President, VP Programs and Professional Development Committee Chair
Robert Qualls	Second Vice President, VP Membership and Publicity Committee Chair
Martha Vandeleest	Secretary
Barb Ristau	Treasurer
Mike McNamara	Membership & Retention Committee Chair and Headquarters Liaison
Nick Guerrieri	Past President & Nominations Committee Chair
Valorie Hamilton	Diversity Committee Chair
Denise Kitzerow	Peer Group Chair
Greg Williams	Strategic Partners Committee Chair
William Lepley	Academic Relations Committee Chair
Scott Dell	Career Management Committee Chair
Howard Bornstein	Board Member
Mark Heffernan	Board Member
Pam Turicik	Board Member

**FEI Northeastern Wisconsin Chapter Strategic Partners**

*Click on each company to visit their web site.*



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**Associated Financial Group**



*An instinct for growth*



**Candor. Insight. Results.**



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