

**Membership Update**

Our new year of Chapter meetings is quickly approaching and it will be great to see everyone again. We have another outstanding lineup of speakers that will be released shortly.

The National Office will once again allow chapters to select two months during the year to offer a discounted rate of \$399.00 for the National dues versus \$525.00. This has been a very popular promotion around the country. Our tentative plans are to offer this promotion during the months of October 2015 and February 2016. Please reach out to fellow financial professionals you know, that you think may benefit from an FEI membership, and invite them to the September 15 meeting. There is no cost for them to attend and we will wait to submit their applications until October.

Finally, I want to thank the individuals (see right-hand column) who recruited our 22 new members during the competition year that recently ended. **They are the ones who deserve all the credit for our Chapter's growth.**

**Mike McNamara**  
Membership & Retention Chair

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(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, which is usually held on the third Wednesday of each month at 1:00 p.m. CT.

**The dates for the next webcasts are Wednesdays, August 19, September 16 and October 21, 2015 at 1:00 p.m. CT.** To register for a 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 these webcasts, 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	219
2016	230 (GOAL)

Members as of  
July 24, 2015: 211

Due to terminations and transfers, our Chapter goal is to add **30 NEW members** this fiscal competition year ending April 30, 2016.

### MEMBERSHIP RECRUITERS FOR 2014-2015 COMPETITION YEAR

**GOLD RECRUITERS**

Three or More Members  
Joe Toonen (4) (Grant Thornton)

**SILVER RECRUITERS**

Two Members  
Fred Bowes

**BRONZE RECRUITERS**

One Member

- |                           |                       |
|---------------------------|-----------------------|
| Jon Bilodeau (AON)        | Tony Ellis            |
| Mark Fischer (Associated) | Kurt Gresens (Wipfli) |
| Amy Grinnell              | Bill Guc              |
| Mark Heffernan            | Amy Henselin (GT)     |
| Steve Huntington          | Julie Kimps (Experis) |
| Theresa Lauer             | Bob Mathews           |
| Dave Nelson               | Mike Panas            |
| Dick Rupiper (Aon)        | Amy Schilling         |
| Terry Ver Straate         |                       |

# Please Welcome Our Newest Chapter Member!



**HOLLY NELSON**

Principal

HLN Advisory Services

Winneconne, WI

Transfer in from the Colorado 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:

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.

1. Any new members whose applications are processed from July 1, 2015 through June 30, 2016, 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 2015-2016 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 our next Chapter event. **Thanks for your continued support in helping to grow OUR Chapter.**