



July/August 2016 Membership Update

We are approaching the start of our monthly chapter meetings for fiscal 2016-2017 which means our recruiting efforts will begin to pick up again. The national dues have been \$525.00 annually for the Executive Membership Category. It was announced at the Summit in May that the FEI National Board approved reducing these dues to \$399.00 from June 1, 2016 through June 30, 2017 for the **first year of membership**. They support the advocacy for all financial professionals. In addition, they provide resources for research and a forum for sharing knowledge.

The local chapter fees are \$200.00 annually and they cover the seven professional development sessions and pre-dinner speakers, dinners and beverages. At approximately \$7.00 per hour (based on Chapter fees) it is very inexpensive CPE. 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!

Please reach out now to fellow financial professionals you know, who you think may benefit from an FEI membership, and invite them to our first meeting which will be held on Tuesday, September 20, 2016. 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
Mike.McNamara@tqmillwork.com
(920) 533-4860, extension 222 (office)
(920) 539-1255 (mobile)



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	230 (GOAL)

Members as of
July 28, 2016: **219**

Due to terminations and transfers,
our chapter goal is to add
30 NEW members this fiscal competition year
ending March 31, 2017.

MEMBERSHIP RECRUITERS FOR 2016-2017 COMPETITION YEAR

GOLD RECRUITERS

Three or More Members

SILVER RECRUITERS

Two Members

BRONZE RECRUITERS

One Member

Bob Faulds (Baker Tilly Search & Staffing)
Adam Wunderlin

Please Welcome Our Newest Chapter Members!

ERIC HANSEN

Assistant Controller
LaForce Inc.
Green Bay
Recruiter: Bob Faulds
(Baker Tilly Search &
Staffing)



SHAWN ANHALT

Assistant Controller
J.F. Ahern Co.
Fond du Lac
Recruiter: Adam Wunderlin



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, 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) 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.

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. **The date for the next webcast is Wednesday, September 21, 2016 at 1:00 p.m. CT.** 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.