



May/June 2017 Membership Update

Thanks to your help with recruiting we have added 13 new members since March 1, 2017! We currently are still down a net of two members since the beginning of our fiscal year on July 1, 2016. This is driven by 26 members who have not renewed their membership. They are primarily members who have not been able to attend our chapter functions. Our fiscal year ends June 30, 2017 and we would really like to at least “breakeven” which means we need to have a **net** increase of two members by then.

It was announced at the Summit last May that the FEI National Board approved reducing the National dues for Executive members from \$525.00 to \$399.00, from June 1, 2016 through June 30, 2017, for the **first year of membership**. The local chapter fees are \$200.00 annually and they cover the seven professional development sessions and featured speakers, dinners and beverages. 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!

The best way to recruit new members is through personal contact. Please reach out now to fellow financial professionals you know, who you think may benefit from an FEI membership, and invite them to one or more of the functions we have scheduled during June 2017, including a Peer Group Meeting for members and prospective members with prior approval (June 1), Summer Golf Outing and Social Event (June 19), Diversity Group Lunch and Learn Webinar (June 20), and a Career Development Workshop (June 27). These will be great programs and the details and registration links are all listed in this E-newsletter. There is no cost for them to attend these programs, with the exception of the Golf Outing, and they are excellent opportunities 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	216	(REVISED GOAL)	

Members as of
May 24, 2017: **214**

Due to higher than normal terminations we have revised our goal to end the fiscal year on June 30, 2017 at breakeven from a membership standpoint.

MEMBERSHIP RECRUITERS FOR 2016-2017 COMPETITION YEAR

GOLD RECRUITERS

Three or More Members

Bob Faulds (Baker Tilly Search & Staffing)
Mike McNamara

SILVER RECRUITERS

Two Members

Nick Guerrieri
Denise Kitzerow

BRONZE RECRUITERS

One Member

Larry Barton	Dave Leiti
Howard Bornstein	Mark Olsen
Dan Clark	Dan Pichler (Wipfli)
Jim Gallimore (BMO)	Dick Rupiper (Aon)
Barry James	Jim Stahl (Schenck)
Jim Kiekhaefer	Terri Towle
Julie Kimps (Experis)	Adam Wunderlin

Please Welcome Our 13 New Chapter Members!

AARON BLEIER

Finance Director
NOVO Health
Appleton
Recruiter: Mike McNamara



BRANDON DELROW

Controller
Cal-Ray, Inc.
Oshkosh
Recruiter: Jim Stahl
(Schenck)



PATRICK DUNNE, CPA, CIA

CFO
Milk Source, LLC
Kaukauna
Recruiter: Mike McNamara



JOSH ENGELS, CPA

Director of Finance
Pioneer Metal Finishing
Green Bay
Recruiters: Nick Guerrieri
& Bob Faulds (Baker Tilly
Search & Staffing)

**IMAGE
NOT
AVAILABLE**

CHAD FUSS

Assistant General Manager
- Finance
Oneida Nation
Oneida
Recruiter: Larry Barton

**IMAGE
NOT
AVAILABLE**

SARA HURLEY, CPA

Controller
U.S. Gain (Division of U.S.
Venture)
Appleton
Recruiter: Julie Kimps
(Experis)



MICHELLE KANE

Director of Finance
EMT International
Hobart
Recruiter: Dan Pichler
(Wipfli)



SCOTT LAFOND

Senior Financial Analyst
Dominion Energy
Keweenaw
Recruiter: Mike
McNamara



New Chapter Members Continued

**ROB
MICHALKIEWICZ,
CPA**

Director of Corporate
Accounting Plexus Corp.
Neenah
Recruiter: SEC Pros
Promotion



**STEFANIE
PETERSON, CPA**

Controller
Dura-Fibre, LLC
Menasha
Recruiter: Dan Clark



KRIS RAEDER, CPA

CFO
Skana Aluminum Company
Manitowoc
Recruiter: Dick Rupiper
(Aon)



KRISTIN VAN RITE

Controller
Performa, Inc.
De Pere
Recruiter: Mark Olsen



DAN WEISS, CPA

Director of Finance
Sartori Company
Plymouth
Recruiter: Dave Leitl



Member Benefits: Getting to Know Your FEI

This webcast will give you in-depth insights into your FEI membership benefits and career service offerings as well as updates on technical committee activities, and new research efforts from FERF (Financial Executives Research Foundation). One of our National Board Directors will welcome our newest members. We encourage all members to participate in one of these webcasts. **The dates for the next webcasts are both Wednesdays, June 14 and July 19, 2017, at 1:00 to 1:45 p.m. CDT.** To register for the webcast, go to www.financialexecutives.org and click on “Events” and then “Webinars” to register. If you have any questions about this webcast, please feel free to contact Mike McNamara.



**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 proposition that our chapter offers. 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, 2016 through June 30, 2017, 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 have signed in and signed out on the attendance sheets for each meeting at the registration table with Michelle Weiss, our Chapter Administrator.
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 2016-2017 fiscal year to determine whether to continue it for future years.
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