

**Northeastern Wisconsin
Chapter Newsletter
December 2013/January 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
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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.
Wednesday, April 16, 2014 St. Norbert College De Pere, WI	M&A Transaction Services/Due Diligence Mason Wells and Grant Thornton	Don Robillard, CFO Hunt Consolidated, Inc.

Diversity Group Event	Peer Group Meetings	Golf Outing & Social Event	Meeting with Governor Walker
Thursday 9/26/13 Wednesday 12/4/13	Thursday 8/22/13 Thursday 11/21/13 Friday 2/28/14 Thursday 5/22/14	Monday 9/9/13	See page 7 for update.

**Chapter
President's
Message**

Season's Greetings! Thanksgiving and Hanukkah came and went, the deep freeze is setting in and the malls are packed with shoppers for the next big holiday. Oh yeah, some of us on calendar fiscal years are finalizing 2014 budgets and preparing for year-end too! Where does the time go?

We had a great turnout for the November Chapter Meeting at St. Norbert College. The keynote speaker was retired Congressman David Obey, pictured here to my left.

The professional development session was a tax update presented by a panel of experts moderated by Tim McCoy of Godfrey & Kahn (pictured below far left) and Dan Pichler of Wipfli. The panel members included (pictured at the panel table from left to right): James Phillips of Godfrey & Kahn, Jeffrey Gross of Wipfli, Ryan Laughlin of Wipfli, and Jed Roher of Godfrey & Kahn.



From an FEI standpoint we are nearly mid-way through our fiscal year but we still have four chapter meetings to go! We are back in business in January with keynote speaker Mike Haddad, President & CEO of Schreiber Foods, Inc. and a professional development session by Francis Investment Counsel.

On behalf of the entire leadership group of FEI Northeastern Wisconsin Chapter, I wish you a joyous season with family and friends and a prosperous 2014.

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

*Happy
Holidays!*

**JANUARY
Chapter
Meeting**

**TUESDAY
JANUARY 21, 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 January 14, 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 January 17, 2014.

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



**Michael J. Haddad
President and CEO
Schreiber Foods Inc.**

Mike Haddad is President and Chief Executive Officer of Schreiber Foods and a member of Schreiber's Board of Directors. He was named to this position in December 2008. He joined Schreiber in 1995 as a Business Sales Manager for Northeast Retail after spending eight years as a Perishable Food Broker for Haddad Enterprises, a family owned business. He was named National Sales Director- Distributors in 2002, a Vice President in 2004 and a Senior Vice President in 2005. In 2006, he was named President and COO and elected to the Schreiber Board of Directors.

In the community, Mike is a former Director for the Make-A-Wish Foundation-Wisconsin Chapter. His involvement with Make-A-Wish began in 2000 as a Wish Grantor and continues today. Mike is also on the Board of Trustees for St. Norbert College and Board of Directors for Bellin Health Systems. Mike is also a veteran having served four years in the United States Marine Corp Reserves.

Headquartered in Green Bay, Wis., Schreiber is the largest employee-owned dairy company in the world, with annual sales of \$5 billion. Schreiber sells its products – which include cream cheese, natural cheese, process cheese and yogurt – to leading retailers, restaurants, distributors and food manufacturers around the world. Schreiber has 35 manufacturing and distribution facilities globally in the United States, Austria, Brazil, Germany, India, Mexico and Uruguay.

Professional Development Session

**Globalization & Inflation: Themes that are
changing the investment paradigm**



In a finance leadership position you undoubtedly have responsibility, or exert influence over the investment of assets: treasury assets, corporate retirement assets, credit facilities, and even your personal investments. We are in the midst of a dramatic shift taking place in the world's capital markets and your understanding of these trends will define your investment success. The investment professionals from Francis Investment Counsel will provide attendees with an understanding of the factors driving the globalization of the financial markets, regions where the greatest opportunities for growth exist, resources available to capitalize on these opportunities, and evaluation techniques you can employ to vet the financial products available to you. Layered into the discussion will be the impact of changes in the credit markets and the influences inflation will have on your investment strategies.

This session will cover the following learning objectives:

- Globalization of Capital Markets: The old paradigm which relied heavily on domestic fixed income and equity investments has changed and there is no turning back on the impact of the globalization of the capital markets. Understanding the factors contributing to this change and the projections for its continuing at an accelerated pace will have you rethinking your current asset allocation decisions.

(Professional Development Presentation Learning Objectives Continued)

- Inflation: It's been talked about for some time and most would agree the threat is real. The professionals are already positioning their portfolios to mitigate the impact. A discussion of the impact on capital markets, the credit environment and the various strategies available to investors will prepare you to navigate the changing interest rate environment.
- Alternative investment vehicles: As the capital markets change the financial industry responds with a variety of products and solutions for investors. A discussion of the trendy alternative strategies and how to evaluate them will provide you with the tools to effectively evaluate their suitability for your investment needs.
- Diversification: Given the information presented how should you position the various pools of money you oversee? We'll discuss the meaning of portfolio diversification and provide you with tools to effectively diversify your portfolios.

January Professional Development Session Presenters



Edward McIlveen, CFA, Director of Performance Analytics and Research.

Ed leads the firm's performance analytics and research team and coordinates the extensive investment manager due diligence activities of his team. He performs ongoing capital markets and mutual fund reviews for institutional clients, as well as asset allocation optimization analysis. He manages the firm's investment manager and mutual fund databases to facilitate manager searches and evaluations and is a member of the firm's Investment Committee. Ed graduated from Marquette University with a Masters of Business Administration specializing in finance and earned a Bachelor of Arts Degree (cum laude) from Gustavus Adolphus College.



Kevin Roloff, CFA, Research Analytics Specialist.

Kevin serves as Research Analytics Specialist for Francis Investment Counsel. He performs ongoing capital markets research and mutual fund reviews for institutional clients. Kevin is active in conducting manager due diligence activities including visiting asset management organizations to evaluate their personnel, investment processes, and systems. He utilizes investment manager and mutual fund databases to facilitate manager searches and evaluations. Kevin is a member of the firm's Investment Committee. Kevin graduated from Marquette University's Applied Investment Management Program with a Bachelors of Science in Business Administration (magna cum laude).



Financial Executives International (FEI) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.

JANUARY 21ST CHAPTER MEETING: Instructional Method: Group-live Experience Level: Basic Prerequisites / Advance Preparation: None Field of Study: Keynote Presentation = Business Management & Organization; Professional Development Session = Administrative Practice. Recommended CPE Credits: Professional Development Session = 2.5; Keynote Speaker = 1.5

FEBRUARY 18TH CHAPTER MEETING: Instructional Method: Group-live Experience Level: Basic Prerequisites / Advance Preparation: None Field of Study: Keynote Presentation = Economics; Professional Development Session = Risk Management. Recommended CPE Credits: Professional Development Session = 2.5; Keynote Speaker = 1.5

For FEI CPE credits, one credit hour equals 50 minutes according to NASBA guidelines. Some state boards may differ on how many minutes constitute a credit hour. Contact your state board for more information. For more information regarding administrative policies such as complaint and refund, please contact Patti Ayala, Chapter Administrator: payala@new.rr.com.



**TUESDAY
FEBRUARY 18, 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 February 11, 2014

[Click Here to Register](#)

CPE CREDITS

Professional Development
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Keynote Speaker Presentation
Qualifies for 1.5 Credits

CANCELLATION POLICY

Please send cancellations to
payala@new.rr.com no later than
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FEES

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

CONTACT

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Keynote Speaker Presentation



William A. Strauss
Senior Economist & Economic Advisor
Federal Reserve Bank of Chicago

As Senior Economist and Economic Advisor in the Economic Research Department at the Federal Reserve Bank of Chicago, which he joined in 1982, Mr. Strauss’ chief responsibilities include analyzing the current performance of both the Midwest economy and the manufacturing sector for use in monetary policy. He produces the monthly Chicago Fed Midwest Manufacturing Index and organizes the Bank’s Economic Outlook Symposium and Automotive Outlook Symposium. In addition, he conducts several economic workshops and industrial roundtables throughout the year.

Strauss has taught as an adjunct faculty member at Loyola University Chicago and Webster University in Chicago. He currently teaches at DePaul University Kellstadt Graduate School of Business and at the University of Chicago Graham School of General Studies. At the latter institution, he was named winner of the 2010 Excellence in Teaching Award in the Business and Professional Programs. His research papers include analysis of the manufacturing sector, the automotive sector, the Midwest regional economy, the trade-weighted dollar, business cycles and Federal Reserve payments operations.

Strauss has been interviewed on numerous television and radio shows and quoted in the major business magazines and newspapers. He has also provided testimony concerning manufacturing issues to the U.S. Senate. He is a past president of the Chicago Association of Business Economists; a past board member for the National Association for Business Economics; a member of the National Business Economics Issues Council; a member of the Dean’s Advisory Council for the University at Buffalo; a member of the Advisory Council for the University of Illinois at Chicago’s Center for Economic Education; a member of the Economic Advisory Committee for the Council on Competitiveness; and a board member of Global Midwest Alliance.

Professional Development Session



2014 Risk Update – Insights for Decision Making

This two-part professional development session will focus on two risks significantly impacting organizations today – healthcare and property/casualty insurance. These panel based sessions will encompass discussion on short term and long term considerations associated with these risks as well as direct and indirect cost implications.

The healthcare panel will include a regulatory update, discussion on continued development of program funding arrangements with specific emphasis on private healthcare exchanges, and a review of cost mitigation strategies with specific emphasis on wellness initiatives.

The property/casualty panel will include an update on commercial insurance market conditions, a discussion on emerging risks, and a review of the key elements and issues associated with non-contractual risk transfer.

Membership Update

National decided to offer the Member-Get-A-Member incentive program again from November 1 through December 31, 2013, where you can receive a gift card for each new member you recruit. Our pool of prospective members is lower than it has been for some time.

We could use some extra recruitment help over the next several months. 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 page 7) 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.

Please call someone today who you think might benefit from an FEI membership and invite them to a chapter meeting. Thanks for your continued cooperation in helping to grow OUR Chapter.

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



Please Welcome Our Newest Chapter Members!

JILL BADTKE Controller Foth & Van Dyke & Assoc., Inc. De Pere Recruiter: Howard Bornstein	PAUL FUHRMAN CFO Jewelers Mutual Insurance Co. Neenah Recruiter: Carl Rudolph
SHANNA ZAHN Corporate Controller, Director of Accounting and Reporting Fincantieri Marine Group De Pere Recruiters: Paul Belschner & Julie Kimps	

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 11/25/13: 216

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

SILVER RECRUITERS

Two Members
 Paul Belschner
 Julie Kimps (Experis Finance)

BRONZE RECRUITERS

One Member
 Howard Bornstein
 Fred Bowes
 Carl Buchinger
 Richard Dannhausen
 Scott Dell
 Kurt Gresens (Wipfli)
 Jim Kiekhaefer
 Ken Larsen
 Linda Nila
 Dan Pichler (Wipfli)
 Carl Rudolph
 Greg Sofra (Baker Tilly)
 Joan Strand

Breakfast, Lunch or Dinner With the Governor?

The Madison Chapter was not able to arrange a breakfast, lunch or dinner with Governor Scott Walker this fall. They remain committed to arranging this meeting. They are going to ask his staff for potential dates in calendar 2014 as opposed to giving them certain dates. As soon as we receive an update from the Madison Chapter we will let you know. Event Coordinator Mike McNamara: mike.mcnamara@tqmillwork.com

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, December 18 and Wednesday, January 15 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.

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.



Money
Back
Guarantee!





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.



Future Meeting Dates: *Friday 2/28/14 and Thursday 5/22/14*

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 |
|--|---|

Diversity Group

The September 26th Advancing Women's Development fusion event at the PAC was outstanding. Over 50 companies were represented with about 1000 participants. The event began with Diane Roundy, Director of Business Development for Schenck, presenting "How to Work a Room." A few elements Diane shared: plan a less than 10 second self-introduction including your first and last name; seven touches need to occur before someone can remember you; and continue eye contact during the 8-10 minute conversation. The presentation is based on the book *How To Work a Room* by Susan RoAne.

Juliet Funt was the keynote speaker presenting "WhiteSpace." Juliet walked through how to reclaim your WhiteSpace and take back control of your time: manage your meetings and email so they don't kill productivity; create a strategic pause to allow for thinking and become more engaged; allow time to create ideas and connect the dots. Creativity is needed for problem solving. The numbers tell the sad tale: creativity scores in the U.S. have been in steady decline for 18 years and 71% of employees are either not engaged or actively disengaged. A few suggestions from the presentation were to:

- Create WhiteSpace for others by reducing the "cc" on emails.
- Redistribute your effort....delegate. Is there anything that I can let go of?
- Make changes in small manageable chunks.
- Control timing of emails versus immediate responses.



Valorie Hamilton
Diversity Group Chair

valorie.hamilton@endries.com

Please join us for future Diversity Group events. The 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.

2013-2014 Chapter Leaders

Contact Information

Nick Guerrieri

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

Mike McNamara

Membership & Retention Chair
(920) 533-4860 ext. 222 - office
(920) 539-1255 - mobile
mike.mcnamara@tqmillwork.com

Patti Ayala

Chapter Administrator
Newsletter Editor
(920) 819-8509
payala@new.rr.com

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
Mary Jo Wenzel	Career Management Committee Chair
Bob Qualls	Publicity Committee Chair
Howard Bornstein	Board Member
Eileen Jahnke	Board Member

FEI Northeastern Wisconsin Chapter Strategic Partners

Click on each company to visit their web site.



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