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fort wayne chapter

Chapter Happenings

MARCH 2021



MESSAGE FROM THE PRESIDENT

Team FEI Fort Wayne,

There is hope. Spring seems to be on the way. That, along with increased COVID vaccines, is making our spring and summer look a little more social. I'm definitely looking forward to the start of golf season. My league starts in mid-April and it can't get here soon enough. There's nothing like chasing a white ball around to kick off summer!

While our main program in March is virtual, the tour we have planned for April will be a "live" event. The Board is discussing holding some in-person events over the summer as well. Like all of you, the Board recognizes that part of the value of FEI is found in conversing with others. We will get there!

We have had some amazing programs in the new year:

Thanks to John Court for bringing us Sheila Bannister from EPIC to talk about wellness and shifting the paradigm. Allison Massari, who was trapped in a car and nearly burned to death, had quite a story to tell. Her amazing comeback story will stay with me for a long time!

Thanks to Nick Yack for bringing us PNC's Amy Carezza and Kaley Keeley who gave us valuable information on helping our employees become wiser, wealthier, and healthier by providing good financial wellness expertise. Mike Brown was inspiring and took us out of our comfort zone for a bit. My favorite line was "We need to get comfortable being uncomfortable." That's not easy.

The February panel on "Business Exit Strategies – Plan for Succession" was well attended. It was a seasoned group of people sharing a lot of wisdom to help us better navigate the transfer of power as businesses undergo ownership changes.

Our February Career Development session designed to help us avoid "The Top IRA Planning Mistakes" by David Ghormley was very well done. The Secure Act, which became effective in 2020, brought many changes to retirement plans. Thank you to Kyle Farmer from Edward Jones for bringing David to us.

For fun, we also held a virtual trivia event. It was a very entertaining and good use of an hour even though my team lost. We are holding a second event on Friday, March 19 from 4-5 PM. Take a chance and sign up. I promise you'll have some laughs and get to know a few other FEI members a little better.

UPCOMING EVENTS

CHAPTER MEETINGS | PD SESSIONS

FRIDAY | MARCH 19, 2021

Virtual Trivia Night | 4 - 5 p

TUESDAY | MARCH 23, 2021

*Leadership Challenges in a Remote World
Virtual | 2:30 - 5p*

TUESDAY | APRIL 6, 2021

Career Management—Virtual | 7—8a

WEDNESDAY | APRIL 14, 2021

Tour of The Bradley | 1 - 2:30p

WEDNESDAY | JUNE 16, 2021

Rum Runners Boat Tour | 5p

*Visit our FEI Fort Wayne Chapter Website for
the latest Events and News.*

[https://www.financialexecutives.org/
Network/Chapters/Fort-Wayne/Home.aspx](https://www.financialexecutives.org/Network/Chapters/Fort-Wayne/Home.aspx)

MESSAGE FROM THE PRESIDENT—CONT'D

I'll say it again. This is a great time to be able to participate in programs that simply did not happen prior to COVID. The national programs, as well as programs put on by other chapters, open up a new world to us that we did not see prior to March of last year. Take advantage of it.

I am currently participating in the FEI Transformational Leadership series. **Andrej Suskavcevic**, the CEO of FEI, is one of the presenters. It is comprised of seven 90-minute virtual meetings to "prepare you to evoke your leadership skills, empower yourself, and experience a transformation through conversations focused on authentic leadership in a new era. The conference is \$149 for all seven sessions and I'll earn 10.5 CPEs by the end. It's another example of great programming.

Speaking of opportunities, FEI Leadership Summit, which was to be hosted by the Arizona Chapter, will be held virtually again this year. This is one of FEI National's premier annual conferences. Like last year, they will be holding it over several days, May 4, 6, 11, 13, 18, and 20. This is a great opportunity to attend a conference for a very reduced rate while earning up to 24 CPEs. Watch your email for more information.

The Membership Committee continues to bring in new members. Thanks to all of you for selling FEI!

We are continuing to look for new people to join committees. When we were meeting in person, it was easy to talk to you during the cocktail hour or plan strategically to sit with you at dinner. Our virtual world is making it harder to get members involved. I can honestly say that my time on committees and the board has been very rewarding. Please think about getting more involved. Here are areas where we are looking for new members:

Career Management – Lisa Brown | lrbrown@indianatech.edu

Programs/PD Sessions – Zach Sauder | zsauder@ksmcpa.com & Shelly Musolf | SRMusolf@indianatech.edu

Membership – John Minnich | john@johnjminnich.com

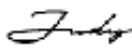
Member Engagement – Matt Fortney | mfortney@pizzahutfwi.com

Website – Jason Knothe | jason.knothe@JHSpecialty.com

If you are interested in joining these committees, reach out to me or any of the chairs directly. We need you! Yes, we need you!

The Program Committee continues to work hard to put great content in front of us. Please make sure to get the future meetings on your calendar. See details in this newsletter.

Yes, despite COVID, there is a lot planned this spring for the Fort Wayne Chapter of FEI. I look forward to "seeing" all of you over the next few months. My sincere hope for you is that you stay healthy and your families as well!



Judy Roy
President

PROGRAMS

Our March 2021 event is on a topic that we all can relate to – The Leadership Challenges in a Remote World. Kyle Courtaway, a master coach and leader with over 25 years of experience developing talent in Fortune 500 organizations as he shares how, in a VUCA (Volatile, Uncertain, Complex, Ambiguous) world, the best leaders take conscious steps to create a culture of both psychological safety and accountability when it matters most. He will review a set of vital leadership practices that you can use to help you maximize the quality of your relationships and results.

This virtual event is from 2:30 pm - 5 pm on **March 23**. We will have a break partway through. It is strongly suggested that you attend the entire event. The invite for this event was sent in late February, so please RSVP soon. We look forward to seeing you there!

RSVP Link— <https://www.eventbrite.com/e/fei-virtual-event-the-leadership-challenges-in-a-remote-world-registration-142597666459>

PROGRAMS—CONT'D

We are excited to announce an in-person event! Our business tour this year will be of the newly opened boutique hotel, The Bradley. Barbara Bradley Baekgaard, Co-Founder of Vera Bradley, had the vision for a downtown hotel to feel more like a home for guests and be a true reflection of the city of Fort Wayne. Mark your calendars for April 14 to join us to see and learn about the fruition of that vision. The tour will be held from 1-2:30 pm. Details on the logistics of the tour will be coming soon.

To finish out the year, we are hoping we can get together in person again and have some fun on a Rum Runner Boat Tour. More information to follow on that.

Thank you to our strategic partners who have provided information on topics and speakers for this year's programs. Also, thanks to our members for attending the sessions in this unconventional, mostly virtual, year.

The programming committee wants to hear from you! We welcome your feedback on the sessions this year. If you have topics/speakers you feel would be good for next year, please let us know. Contact **ZACH SAUDER** at zsauder@ksmcpa.com or **SHELLY MUSOLF** srmusolf@indianatech.edu.

Events Page—<https://www.financialexecutives.org/Network/Chapters/Fort-Wayne/Events.aspx>

NEW MEMBERS

FEI Fort Wayne welcomes **ANDREA VAN WYNGARDEN**, *Controller* with Junior Achievement of Northern Indiana, and **SUSAN WESNER**, *Chief Financial Officer* with Greater Fort Wayne, Inc. Please take a moment to welcome them! Both are great additions to our Chapter. Wonderful news, Andrea and Susan!



ANDREA VAN WYNGARDEN

Controller

Junior Achievement of Northern Indiana



SUSAN WESNER

Chief Financial Officer

Greater Fort Wayne, Inc.

In John's upcoming role as Chapter President, he will continue supporting membership growth initiatives in addition to our other teams.

From professional networking to career enhancement opportunities, Financial Executives International provides value add for its members. Please continue spreading the word on who we are and offer.

If you or a colleague are interested in learning more about membership, please contact **JOHN MINNICH** at john@johnjminnich.com or **260.250.3693**. For membership criteria: <https://www.financialexecutives.org/Become-a-Member/Membership-Criteria>.

MEMBER ENGAGEMENT UPDATE

As we continue to add more new members to our chapter, it is important to make sure everyone is engaged with the chapter and receives value from their membership. One initiative we are starting is having introduction conversations with newer members - those that have joined since 2019. We plan to offer conversation opportunities and hope to talk to each of these members by the end of March. In addition to answering questions for newer members, we will focus on 3 major areas: (1) the meeting schedule and what can be expected at the various meetings, (2) show digital tools like the FEI national site, FEI Connect, and our local LinkedIn group, and (3) introduce FEI National board, other chapters, and our local Board and committees. We are excited that these conversations will allow members to leave the discussion feeling more comfortable with the chapter and more knowledgeable about their membership value.

If there are questions for the Member Engagement Committee, please email **MATT FORTNEY** at mfortney@pizzahutfwi.com.

THANK YOU TO OUR CHAPTER SPONSORS

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