



financial executives
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arizona chapter



FEI Arizona Chapter e-Newsletter

February 2017

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Calendar of Events

2016-17 Program Season - Dinner Meetings

February 7, 2017

Elliott Pollack, Sr. VP &
Economist, Elliott D. Pollack and
Company

March 14, 2017

Academic Excellence Awards
Night
Craig Van Slyke, Dean of the
W.A. Franke College of Business,
NAU

April 12, 2017

Jeff DeWitt, Treasurer, State of
Arizona

May 9, 2017

Greg Lee, CFO, Arizona Cardinals

Join us for the chapter meeting on Tuesday, February 7, 2017

at the Phoenix Country Club, 7th St. & Thomas

SCHEDULE:

4:00 p.m. - Meeting Choices:

The CFO's Primer for Preparing and Managing a Deal Process

Presented by May Potenza Baron & Gillespie

OR

CAREER SERVICES MEETING

Truly Effective Leaders Do This One Thing

Presented by Christina Howard, CL Howard Group

5:00 p.m.

Networking - Hosted Cocktails sponsored by

**Bank of America
Merrill Lynch**



6:00 pm

**2016-17 Program Season
- Special Events**

February 9, 2017

Vaco Event:
Power Women Networking Event

February 23, 2017

Peer to Peer Roundtable
Breakfast - *The Affordable Care Act*
Hosted by Marsh

March 15, 2017

Phoenix Suns Night
Sponsored by Lovitt & Touche'

March 24, 2017

Pub Crawl
Hosted by Keyser

April 20, 2017

Networking Breakfast
Discussion
Hosted by Keyser

April 24-25, 2017

2017 FEI Summit Conference
Anaheim Marriott

May 18, 2017

Networking Breakfast
Discussion
Hosted by Moss Adams

*All events are at the Phoenix
Country Club unless otherwise
noted.*

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Dinner Meeting

Economic Outlook for 2017

Elliott D. Pollack, CEO, Elliott D. Pollack & Company

7:30 pm
Adjourn

RSVP's due by noon on February 3, 2017

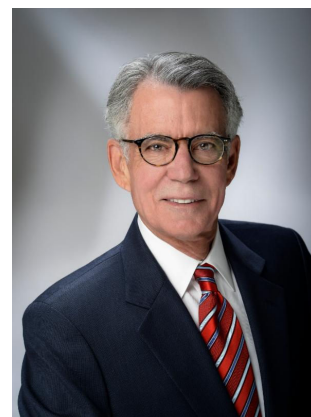
To register for the meeting, please click the link below:

[Register Now](#)

**Dinner Program -
6:00 p.m.**

Economic Outlook for 2017

Elliott D. Pollack, CEO, Elliott D.
Pollack & Company



Mr. Pollack, a local economist with Elliott D. Pollack & Company based in Scottsdale, will speak on the national and local economic and real estate outlook answering questions such as: What can we expect under President Trump's plan? Will the new plan have a significant impact on the economy? How has the national economy been performing in this cycle and what does that mean for the local economy? Why has Arizona growth in this cycle been subpar relative to its historic norm? Will population flows improve? How have the commercial markets (multi-family, office, retail and industrial markets) in Greater Phoenix been performing and how will it all turn out?

Approved for 1 CPE credit; Field of Economics

About Our Speaker

Elliott D. Pollack is CEO of Elliott D. Pollack and Company, an economic and real estate consulting firm in Scottsdale, Arizona established in 1987. The firm serves a broad range of clients in both the public and private sector ranging from law firms, utilities, banks, retailers, major service firms and real estate related companies to states, counties, Native American communities, cities and universities for both business and policy issues. The firm maintains the most comprehensive economic database in Arizona.

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FEI Arizona Chapter Website!

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The 2016-17 Chapter
Membership Directory is

4:00 p.m. Meetings

The CFO's Primer for Preparing and Managing a Deal Process

Presented by Austin Potenza and Shruti Gurudanti, May, Potenza, Baran & Gillespie, P.C.

The CFO's role in preparing for and managing an acquisition or sale is crucial. By far the greatest bulk of the work falls on his or her desk. Preparing or reviewing due diligence materials; preparing, analyzing and/or summarizing financial information; advising the board or ownership on valuation and related financial issues; assisting in deal structure and related tax issues; and managing the nuts and bolts of the process from start to finish is usually the CFO's responsibility. All this while continuing to perform the normal and recurring functions that already require his or her full attention and energy.

The program and related handout materials will provide the participants with an overview of M&A structures, and an understanding of their related tax concerns, as well as an understanding of the types of buyers, sellers, financing sources and their respective motivations and benchmark criteria. It will discuss the CFO's role in the process from beginning to end, and suggest pre-transaction practices that may reduce the burden when an actual transaction occurs.

Approved for 1 CPE credit; Field of Specialized Knowledge

CAREER SERVICES

Truly Effective Leaders Do This One Thing

Presented by Christina Howard, Founder, CL Howard Group

Most leaders manage, they do not lead. They manage things, tasks, initiatives, and people. To lead, one must as Merriam Webster puts it "guide on a way, especially by going in advance." Leaders do the rigorous work required to become deeply self-aware in order to see how they get in their own way and limit themselves. Because self-aware leaders know what they know, they are able to get genuinely curious about what others know. This self-awareness creates the foresight and confidence to bring together many ideas for the good of the organization.

Approved for 1 CPE credit; Personal Development

About Our Speakers

now on the website on the Members Only page. Access that page with your FEI national login information.

Please submit any changes to your information at anytime throughout the year.

Policy Statements:

On-time reservations are due by 1 p.m. on the Friday before the meeting.

Reservations allow for ordering the right number of meals without waste and cost to the Chapter as well as avoiding the embarrassment of not having enough entrees.

If you make a reservation and subsequently must cancel, be sure to do so by the Thursday before the meeting.

Each member is allowed up to two "no shows" or late cancellations a year - it is understood that life happens. After two, the member (or his/her guest) is requested to pay for the dinner.

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 addressed to the National Registry of CPE Sponsors through its website, www.learningmarket.org.

Instructional method: Group-Live
Recommended CPE Credits: 1.0
Experience Level: Basic
Prerequisites/advance preparation: None

For FEI CPE credit, one hour equals 50-minutes according to the 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 our offices at 973.765.1029.

Austin Potenza is a shareholder at May, Potenza, Baran & Gillespie, P.C., and the head of its transaction practice. He is a certified tax specialist who spends most of his time in the M&A practice. He also teaches M&A at ASU College of Law. For further information:

<http://www.maypotenza.com/attorneys/austin-d-potenza-ii/>
<http://www.axial.net/author/austinpoteza/>

Shruti Gurudanti is an associate at May, Potenza, Baran & Gillespie, working in the transaction practice, primarily in the M&A area. For further information:

<http://www.maypotenza.com/attorneys/gurudanti-shruti/>
<http://www.axial.net/author/shruti/>

Christina Howard has held senior human resource leadership positions for more than 15 years in both private and public, domestic and international, medium to large organizations, across multiple industries including retail, technology, manufacturing, healthcare, education, and non-profit. Her depth of experience and understanding of highly complex matrixed organizations enables her to quickly and accurately assess current conditions and help her clients strategize, navigate, and improve desired leadership skills and organizational effectiveness rapidly.

Peer to Peer Roundtable Breakfast

Topic: "The Affordable Care Act (ACA) - What Can Employers Expect from the New Administration & Congress?"

February 23, 2017

7:30-9:00 am

Hosted by Marsh

2325 E. Camelback Rd., #600

Phoenix 85016

This is limited to 25 members.

Pending approval for 1 hour CPE

[Click here to register.](#)

Bank of America Merrill Lynch



Bank of America is one of the world's leading financial institutions, serving individual consumers, small and middle-market businesses and large corporations with a full range of banking, investing, asset management and other financial and risk management products and services. The company provides unmatched convenience in the United States, serving approximately 46 million consumer and small

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