



portland chapter

connecting financial executives

Portland Chapter

April 2018

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CHAPTER ADMINISTRATOR

Alex Lohmann

Monthly Message



I loved seeing the **strong turnout for March's FEI-Portland chapter meeting**. The professional development session with Moss Adams on Federal Tax Reform was basically standing-room only and the dinner meeting was second highest in attendance so far this chapter year (behind only the September programming kick-off). For future PD sessions, including the April session with Lane Powell,

we'll be opening up the PD room more by eliminating the tables so we can more comfortably seat everyone. We are also working with the MAC for more beverage service to address the influx of members when the PD session releases.

During the March dinner session, it was very interesting to hear from Josh Harwood, Portland City Economist, about how the Portland Metro area compares with other US cities. The big take-aways for me were how much the Portland economy is magnified in terms of reacting to economic trends, both in speed and severity, and (probably not surprising) how highly Portland values quality of life and economic strength at the expense of relative affordability for housing. More strongly than even Seattle and San Francisco!

At the March meeting, the Chapter's Board Nominating Committee put forth recommendation to the chapter membership of a slate of officers and additional board members to serve during the 2018-19 chapter year, starting in July. **We'll be holding a vote for the chapter board members at the April dinner.** There is opportunity for an additional member to be added to the coming year's board and **members are encouraged to nominate deserving candidates.** Not ready to join the board yet? Another opportunity to deepen your engagement with, and learn more about chapter operations, is to **consider participation on the chapter's committees.** Chapter board members often start as a committee member. Your committee chairs welcome your participation and contributions to the success of the chapter, whether or not you have aspirations for serving on the board.

Monthly Message (continued)

Current nominees for officers and the board for 2018-19 are:

Cari Thomas - Chapter President

David Finnie - VP Membership

Doug Adler - VP Programs

Scott Winegardner – Past President

Gareth Nevitt – Treasurer

Jill Nickerson – Secretary

Pete Craven – Partner Relations Chair

Dileep Kulkarni – Career Management Chair

Jerome Kline – Membership Vice Chair

Shauna Deacon – Social Chair

Mike Ware – Academic Awards Chair

Rachel Noah – Intern Coordinator

Cathy Kemnitz – Communication & Newsletter Chair

Brad Blickle – Board Member At-Large

The April meeting is when we recognize outstanding students from the major regional universities during our **Academic Awards night**. Come meet some of the future of finance and accounting's best and brightest on the 19th. I'm confident you'll be impressed and inspired.

Are you considering attending **FEI's annual Leadership Summit** in Houston, May 20th-22nd, but have yet to register? Act fast! The **early registration discount ends April 9th**.

April 15th-30th will be the **final opportunity** during this chapter year for new members to **join FEI Executive Membership** for **first-time dues of only \$299**. If you or someone you know is interested in joining FEI, the time is now! Don't let this best-ever first-time dues rate expire without taking advantage of the discount. The "Chapter Choice" promotion is a fantastic opportunity to get engaged with all the benefits that FEI and the Portland Chapter have to offer. The Chapter Choice application is included at the end of this April newsletter.

We want to hear from you. **Please make your voice heard by completing the Portland Chapter's Membership Satisfaction Survey @ <https://www.surveymonkey.com/r/PDMFV57>** (please note that this is a different, Portland-specific questionnaire than the FEI-National survey highlighted in the March newsletter). Thank you for taking a couple minutes of your time to complete the Portland Chapter survey, and to support your investment in FEI membership.

- Scott Winegardner, FEI Portland Chapter President

EXCELLENCE

In Financial Leadership

Earlybird
Registration Discount
through April 9th!!

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Marriott Marquis Downtown
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DON'T MISS FEI'S 2018 FINANCIAL LEADERSHIP SUMMIT!

Networking Opportunities

Connect and share your ideas with other successful financial professionals.

Professional Development & Practical Solutions

Learn from respected experts about real-world solutions for your current challenges.

Leadership Development

Maximize your management skills. Get the tools and strategies needed through various session tracks.

How Texas Does It
Tomorrow's CFO

Technology
Finance Skills

Exhibit Hall Exploration

Interact with sponsors, exhibitors and fellow attendees and learn about the latest products and services.

TESTIMONIALS FROM LAST YEAR'S ATTENDEES ...

The choice of tracks was compelling and allowed for a blend of leadership with technical training.

A well-rounded experience with networking and professional development, intermixed with some fun.

KEYNOTE SPEAKERS



MEL ROBBINS

AWARD-WINNING CNN CONTRIBUTOR
AND LIFE COACH
The 5 Second Rule

SCOTT PARAZYNSKI

U.S. ASTRONAUT | NASA
Leadership Under Adversity



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Membership Minute

By Dave Finnie

CURRENT MEMBERSHIP PROGRAMS

We have two programs running this month – the final opportunity to take advantage of the Chapter Choice promotion this chapter year and the last few weeks of the MGAM program. Now's the perfect time to bring a guest to a meeting or convince that reluctant colleague to give FEI a try!

CHAPTER CHOICE PROMOTION

From April 15th – April 30th, the initial first-year Executive Membership dues are discounted from \$755 to only \$299! This special offer is the last of our chapter's Chapter Choice promotions for FY17-18 and the best price for new membership that we offer each year. The Chapter Choice application is included at the end of this April newsletter.

IT PAYS TO RECRUIT: FEI'S MEMBER-GET-A-MEMBER PROGRAM

Member-Get-A-Member (MGAM) is a membership acquisition challenge that provides current members the opportunity to share personal insight into the unique value of FEI's membership, as well as shed light on its benefits and services all while being rewarded for their efforts. What better way for future members to learn about what FEI has to offer than through our esteemed membership?

Start recruiting today and reward yourself AND a new member!

- Members who recruit qualified executive category prospects under the "MGAM" promotion by April 30 will receive a \$50 American Express Gift Card per new executive category member recruited.
- New executive category members recruited via MGAM between now and April 30 will pay a reduced, first-year dues of \$495

FEI PORTLAND NEW MEMBER AMBASSADORS

As FEI members, we recognize that finance leadership in Portland is a tightly-knit community with two degrees of separation. Engaging our newest members through the ambassador program gives us an opportunity to build on those connections outside of our regular dinner meetings. Our membership is continuing to grow monthly and we're always in search of fresh faces to help guide our newest members. We would love to see everyone participate as an ambassador, please don't hesitate to join us at our next social!

Please contact Jerome Kline for more information at jerome.kline@billups.com.

**Register now to attend Portland's fourth annual
Enterprise Risk Management (ERM) Symposium on Wednesday, April 11, 2018
at the Multnomah Athletic Club in Portland, Oregon.**

The ERM Symposium is organized by [KPMG LLP](#), [Marsh](#) and [Stoel Rives LLP](#). The 2018 Symposium will showcase leading risk management professionals and industry experts who will address issues impacting Enterprise Risk Management programs. The event will feature lunch keynote speaker, [Adam Levin](#), the Chairman and founder of CyberScout and co-founder of Credit.com.

Enterprise Risk Management topics to include:

- **Privacy & Cybersecurity**
- **Board Governance**
- **Merger & Acquisition Risk Management**

Who Should Attend:

- CEO, CFO, COO, CIO
- Chief Risk Officers
- Presidents/Vice Presidents/Owners
- Directors, Compliance & Quality Systems
- Directors, Enterprise Risk Management
- General Counsel
- Senior Corporate Counsel
- Global Director, Corporate Risk Management
- Senior Risk Analyst/ERM Advisors/Risk & Insurance Managers

Continuing education credits for lawyers, accountants and risk management professionals are pending.

[Click here](#) to register.

REGISTER HERE

Date/Time

Wednesday, April 11, 2018
7:30 a.m. to 2:00 p.m.

Location

[Multnomah Athletic Club](#)
1849 SW Salmon Street
Portland, OR 97205
(503) 223-6251

[Directions](#)

Cost

\$75 (includes breakfast, lunch, symposium and parking)

Parking/Directions

Parking information can be found [here](#).

Questions

If you have any questions or need additional information, please email events@stoel.com.

We look forward to seeing you on **April 11, 2018** for this informative event!

Continuing Professional Education

You may qualify for up to four Continuing Professional Education (CPE) credits when you attend this program. KPMG is registered with the National Association of State Boards of Accountancy as a sponsor of continuing education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual course credits. No advanced preparation or prerequisite is required. This will be a Group-Live (instructor-led) training. Payment will be processed during registration process, and refunds will be issued if requested one week prior to the program.

Learning Objectives

Following this course, attendees should be able to discuss Enterprise Risk Management as it relates to Privacy & Cybersecurity, Board Governance, and Merger & Acquisition Risk Management.

PRESENTED BY



MARSH



Career Services

By Dileep Kulkarni

SAVE THE DATE: JUNE 14TH, 2018 FROM 5:00 – 7:00 PM

Join us for Mapping the Future: The Next Steps in Your Career

We are excited to have our first Career workshop this month. Robert Half in partnership with FEI, is hosting a complimentary workshop on this topic. This 60-minute presentation will be followed by CFO panel discussion and Q&A. You will receive 1 free CPE credit. We will send out the more detailed logistics and flyer soon.

IDEAS FROM FOLKS WHO ARE IN-TRANSITION

If you have ideas how FEI can help your career transition better, please let Dileep Kulkarni dkulkarni@expensereduction.com know.

There are multiple opportunities posted on FEI career center, please visit at <http://careers.financialexecutives.org/jobs/>. Also, there are many additional resources available from resume writing to career learning center that would be good not only for the in-transition members, but for all us. Visit and take advantage of these FEI resources at: <http://careers.financialexecutives.org/jobseekers/resources/>.

CAREER SERVICES WEBINARS

Boost your career and keep your skills sharp with these informative webcasts presented by FEI!

April 23: An Update on Finance in a Digital World

Presented by Deloitte and Workday

April 23 | 11:00 am – Noon Pacific | 1.0 CPE credit

Learning Objectives:

- How digital will impact the role of finance
- The skills and capabilities needed to succeed in the age of digital disruption
- The technologies that are impacting finance (both today and in the future)
- Practical next steps for finance transformation

April 24: Oshkosh Corp: Learn How Heavy Equipment Manufacturer Overcame Excel FP&A Roadblocks

Presented by Oshkosh and Vena Solutions

April 24 | 11:00 am – Noon Pacific | 1.0 CPE credit

Learning Objectives:

- The signs and indications that change is needed
- The biggest benefits from changing and improving FP&A processes
- The key success factors when implementing new FP&A software

Upcoming Events

Date	Event	Location
April 19, 2018	Chapter Meeting & Academic Awards Night with Professor Christopher Dunnville	Multnomah Athletic Club
May 17, 2018	Chapter Meeting with Dr. Dennis Rebelo	Multnomah Athletic Club
June 6, 2018	Annual FEI Portland Golf Tournament	Riverside Golf & Country Club

FEI-Portland April 19th Chapter & PD Meeting

*MAC, 1849 SW Salmon Street,
Portland, OR 97205*

5:00 to 6:00 PM	PD Session with Lane Powell
6:00 PM	Happy Hour & Networking
6:45 PM	Seated for Dinner
7:00 to 8:00 PM	Dinner Meeting with Professor Chris Dunnville

PD Session with Lane Powell

1.0 CPE Credit

Jeff Bird is Chair of Lane Powell's Business Transitions Team. He is a transactional business lawyer with more than 25 years of experience representing public and private businesses in complex business transactions and securities matters. Jeff counsels businesses of all sizes in mergers and acquisitions, public and private securities offerings, tender offers, proxy contests, divestitures for public and private companies, corporate finance and governance, securities law and venture capital transactions.

Darin Sands serves as Co-chair of the Lane Powell's Privacy and Data Security Team and Chair of the firm's Class Action

Team. He represents a number of large northwest companies in ongoing data breach litigation and data breach response preparation efforts. Darin resolves complex commercial disputes and advises clients on maximizing the value of data by helping to formulate efficient and effective data privacy and security strategies. He understands that data is increasingly both the most valuable asset of his clients and their biggest source of risk.

Dinner Session: "Financial Literacy in Oregon"

1.0 CPE Credit

Prior to joining the University of Portland, **Chris Dunnville** was a Senior Executive and thirty-year Wall Street veteran and entrepreneur. He held numerous positions while working on Wall Street, including time spent as a National Training Officer with Smith Barney, where he trained over two thousand new financial advisors in an eighteen-month time period.

In 2011, Chris retired from Wall Street to devote his time to teaching part-time, charitable interests, writing a book and spending more time with his daughter. While in retirement, he discovered his passion for teaching and mentoring students, especially on the topic of Financial Literacy. He completed his undergraduate degrees in both finance and marketing at Georgetown University and achieved a Masters in Real Estate Finance and Development from New York University. Chris currently sits on the Board of Directors at Concordia University (Portland) and Self Enhancement Inc. and serves as the Director of Financial Education at University of Portland.

FEI Portland Annual Golf Tournament

June 6th 2018 – Maybe bring an extra pair of pants in case you get a hole in one!!!

Please be sure to carve out the afternoon/evening of June 6, 2018 on your calendar to participate in the 2018 FEI Golf Tournament at the Riverside Golf & Country Club.

The tournament is taking shape and it will be an exceptional day regardless of your skill level or the weather. You won't want to miss this event as we ease our way into summer - starting with lunch at 11:30, a scramble golf format, refreshments, dinner and prizes. It's predictably fun with people you know along with the opportunity to meet others that are learning more about FEI.

If you have any items to donate for prizes, the raffle and/or the goodie bags, we are welcoming all contributions again this year. Follow [this link](#) and be ready to populate with your handicap (if you don't know this, we'll help you out) along with anyone that you would like to be on your team if they are signing up as well. If you can't make it to the day of golf, consider joining us for dinner. Anyone interested in helping on this fun event please let [Shauna Deacon](#) know.

[Sign up now](#) to get the earlybird rate!



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Three Common Myths about Noncompetition Agreements in Oregon

By Laura Salerno Owens and Brittany Simpson, Markowitz Herbold PC

The story we are about to tell you is sad, but true. It's the story of an executive who has worked in his field for decades and developed a unique and valuable skill set. He is then approached with the professional opportunity of a lifetime. But he is handcuffed from pursuing this opportunity because years ago, he signed a noncompetition agreement with his current employer. Unfortunately, we have seen this scenario play out with countless executives over the years. In our experience, here are the three most common misconceptions executives have about the noncompete they signed in the stack of new hire paperwork.

1. Noncompetes are not enforceable. This is simply not true. Courts in Oregon routinely enforce noncompetes. Provided certain threshold requirements are met, the law allows your employer to keep you from competing for a period up to 18 months after your employment ends. The agreement can restrict you from working for any of your company's competitors or in your company's entire industry. Also, depending on the geographic area in which your employer operates, the agreement could prevent you from working in your field worldwide.

2. No court would really tell me that I can't work in my field due to my noncompete—that would effectively make me unable to earn a living. It merits repeating that noncompetes are enforceable. You can lose valuable skills, connections and most critically your income in your field of expertise for up to 18 months. To put it bluntly, the law may not care how long you've been in the industry or how much of a pay cut you will take to sit out during your noncompete period.

3. I can just "buy" my way out of a noncompete. Many of the executives we deal with are savvy business people who have been involved in some sort of contract dispute. You may know that when one party sues the other over a breach of contract there are usually money damages involved. You might erroneously conclude that you can set aside a certain amount of money to pay any damages from breaching your noncompete and go ahead and work for the new employer. But you may not have experience with injunctive relief and temporary restraining orders. This means that if you signed a noncompete, your former employer can run into court and get a judge to issue an order that enjoins you from working from your new employer. Moreover, you could be found in contempt of court if you violate that order. Your noncompete may also require you to pay your former employer's attorneys' fees.

What can be done? There can be serious, far-reaching consequences for the unwary executive who signs a noncompete. If you find yourself facing a new job prospect and you are asked to sign a noncompete, consult with a lawyer. Likewise, if you are considering leaving your job and have signed a noncompete, you may also want to consult with counsel. There are threshold requirements an employer must meet to have an enforceable noncompete and if any are missing the noncompete may be voidable. The one thing you should not do is put your head in the sand and sign an agreement based on myths and not facts.

We are available to assist you with any questions regarding noncompetes, executive employment agreements, or other employment issues.



Laura Salerno Owens
LauraSalerno@MarkowitzHerbold.com



Brittany Simpson
BrittanySimpson@MarkowitzHerbold.com

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FEI PORTLAND NEW MEMBER APPLICATION



Financial Executives
International

Member Referral _____ Email _____

Executive dues reduced 4/15/2018-4/30/2018

Fax completed application to 973.765.1018 or
email membership@financialexecutives.org

☐ Executive >> ~~\$755~~ **\$299**

☐ Government/Military >> ~~\$455~~ **\$255**

☐ Academic >> ~~\$340~~ **\$240**

☐ In-Transition >> ~~\$340~~ **\$240**

☐ YES! I want to attend FEI's **2018 Financial Leadership Summit** (Houston, TX) for **\$795***. Register me & confirm via email.

* If you register for CFRI and/or Summit your credit card will be charged upon receipt. If you prefer to pay by check, be sure that the total amount includes your due and registration event fee.

Business Information

name

title

company name

company address

city / state / postal code / country

business phone

business fax

business email*

*email required

Preferred Mailing Address

☐ Business ☐ Home

Preferred Email Address

☐ Business ☐ Home

Nature of Entity ☐ public ☐ private ☐ non-profit ☐ other _____

Industry _____

Company Annual Revenue

- | | | |
|---|---|---|
| ☐ Less than \$10 million | ☐ \$10 to \$24 million | ☐ \$25 to \$49 million |
| ☐ \$50 to \$99 million | ☐ \$100 to \$499 million | ☐ \$500 to \$999 million |
| ☐ \$1 to \$5 billion | ☐ More than \$5 billion | |

Company Net Worth

- | | | |
|--|---|---|
| ☐ Less than \$2 million | ☐ \$2 to \$24 million | ☐ \$25 to \$49 million |
| ☐ \$50 to \$99 million | ☐ \$100 to \$499 million | ☐ \$500 to \$999 million |
| ☐ \$1 to \$5 billion | ☐ More than \$5 billion | |

payment options

☐ Check enclosed Please charge \$_____ to my: ☐ Visa® ☐ MasterCard® ☐ American Express® ☐ Discover Card®

Card Number: _____ Expiration Date: _____

Card Holder's Name: _____ Signature: _____

Please Note: Chapter membership fee REDUCED for the 1st year. Your membership may renew at an increased fee.

Personal Information

home address

city / state / postal code / country

home phone

cell phone

email*

*email required

LinkedIn Public Profile URL

Designation ☐ CPA ☐ CMA ☐ CFA ☐ Other _____
Degree ☐ Bachelors ☐ Masters ☐ Doctorate

How did you learn about FEI?

☐ FEI Member ☐ Chapter Meeting ☐ Colleague ☐ Direct Mail ☐ E-mail
☐ Web ☐ Magazine/Newspaper ☐ Other _____

Demographic Information (optional)

Gender

☐ Male
☐ Female

Ethnicity

☐ African-American ☐ Middle Eastern
☐ Asian ☐ Native American
☐ Caucasian ☐ Pacific Islander
☐ East Indian ☐ Other
☐ Hispanic/Latino _____

Birth date (mm/yy) _____

Upon join date of membership, I agree that my business and personal conduct shall at all times be entirely consistent with FEI's Code of Ethics.

Signature and date

(FEI's Code of Ethics on reverse side. Membership is granted on an individual basis and is non-transferable. Dues are not refundable.)

FEI Membership Qualifications

Executive Membership

The Executive membership category is open to those executives who perform some or all of the duties of a financial executive, as defined by FEI and who serve companies of sufficient size to meet FEI's qualifications. Applicants for Executive membership must meet the specified requirements, and must hold a FEI qualifying title or serve on an audit committee as his/her profession.

Typical Qualifying Titles

Chief Financial Officer, Chief Accounting Officer, Controller, Treasurer, Vice President of Finance, Vice President of Planning and Analysis, Vice President of Taxes, Vice President of Pension Fund Investments, Vice President of Risk Management, Director of Finance, Taxes, Treasury, Accounting, and Audit Committee member*

Senior Manager or Manager: Accounting, Auditing (General/Internal), Borrowing & Investments, Budget, Cash, Collections, Compliance, Country, Credit, Finance, Corporate Finance, International Finance Project Finance, Trade Finance, Financial Analysis, Financial Planning & Analysis, Financial Reporting, Foreign Exchange, Investor Relations, Planning, Pension & Investment, Risk, Tax, Treasury

* excludes professionals currently employed by audit firms, consulting firms and service providers

Qualifying Company Criteria (in USD)

- \$2 million in net worth, or
- \$6 million in capital (combined net worth and long-term debt), or
- \$10 million or more in annual revenues
- \$8 million in operating expenses
- \$200 million in total assets (Financial institutions)
- \$40 million total assets (Government corporations / authorities)

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May 20-22, 2018 | Houston, TX

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Peer Networking

Share best practices with top senior-level financial executives at national conferences, regional sessions, local Chapter meetings and online events.

"In such a digital world, I enjoy the face-to-face communication—the network of peers is fantastic."

Dana Price, VP, Mergers & Acquisitions, McGraw Hill

Unique, Timely Research and Professional Development

FEI saves you time by delivering insights on emerging issues directly through actionable research and professional updates.

"Exceptional local and national opportunities for networking and training. Connections and a competitive edge."

Carol Zoellner, VP, North America Finance, Hallmark

FEI's Code of Ethics

FEI's mission includes significant efforts to promote ethical conduct in the practice of financial management throughout the world. Senior financial officers hold an important and elevated role in corporate governance. While members of the management team, they are uniquely capable and empowered to ensure that all stakeholders' interests are appropriately balanced, protected and preserved. This Code provides principles to which members are expected to adhere and advocate. They embody rules regarding individual and peer responsibilities, as well as responsibilities to employers, the public, and other stakeholders. Violations of FEI's Code of Ethics may subject the member to censure, suspension or expulsion under procedural rules adopted by FEI's Board of Directors.

All members of FEI will:

- Act with honesty and integrity, avoiding actual or apparent conflicts of interest in personal and professional relationships.
- Provide constituents with information that is accurate, complete, objective, relevant, timely and understandable.
- Comply with applicable rules and regulations of federal, state, provincial, and local governments and other appropriate private and public regulatory agencies.
- Act in good faith, responsibly, with due care, competence and diligence, without misrepresenting material facts or allowing one's independent judgment to be subordinated.
- Respect the confidentiality of information acquired in the course of one's work except when authorized or otherwise legally obligated to disclose. Confidential information acquired in the course of one's work will not be used for personal advantage.
- Share knowledge and maintain skills important and relevant to constituents' needs.
- Proactively promote ethical behavior as a responsible partner among peers, in the work environment and the community.
- Achieve responsible use of and control over all assets and resources employed or entrusted.
- Report known or suspected violations of this Code in accordance with the FEI Rules of Procedure.
- Be accountable for adhering to this Code.

If you are interested in more details about the Academic, In-Transition, or Government/Military membership categories, please contact FEI's Membership Department via email, membership@financialexecutives.org or phone, 877.359.1070.