



washington state chapter

*connecting financial executives*

**2018 MEMBER  
HANDBOOK**

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# WHO WE ARE

## Our Mission

FEI's mission is to advance the success of senior-level financial executives, their organizations and the profession. Since 1931, FEI has been connecting members through: Interaction Providing local and international forums for connecting you with your peers; Information Providing you with insight to assist in informed business decisions; Influence Providing authoritative representation for your interests; Integrity Providing the tools to advance the profession through ethical leadership.

## Our Vision

### About Financial Executives International (FEI)

FEI is the leading advocate for the views of corporate financial management. Its more than 10,000 best-in-the-business members hold policy-making positions as chief financial officers, treasurers and controllers. FEI enhances member professional development through peer networking, career management services, conferences, publications and research. Members participate in the activities of 74 Chapters in the U.S. and 1 in Japan.

## Our Members

We are 215 members strong and our members represent the senior financial executive profession in Washington State.



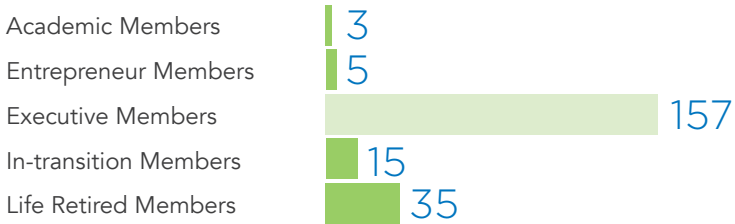
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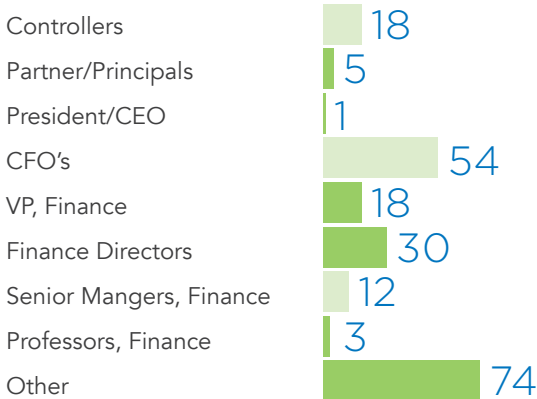
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# WHO WE ARE

## Membership Category



## Our Members Are



# OUR PROGRAMS

## **Our Programs**

The Washington Chapter meetings provide a forum to get to know, on a personal level, our local membership which is comprised of senior finance executives. Meetings are held at least seven times each year and include a cocktail hour, seated dinner and informative presentations. In addition, the chapter provides two member-only socials annually.

## **Professional Development**

### **CPE Sessions**

We offer seven, 1 hour CPE sessions annually on current topics facing financial executives. As a result, 14 hours of continuing education is offered annually at no additional charge.

### **Partnerships**

The Washington Chapter partners with other local organizations such as Enterprise Risk Forum and the National Association for Corporate Directors Northwest Chapter to produce outstanding programming and network opportunities.

# BOARD OF DIRECTORS

## **Chapter Officers**

Cory Stewart, President  
Jodi Colligan, President-Elect  
John Lawler, Vice President of Programs  
Gary Pederson, Vice President of Membership  
Robin Ylvisaker, Treasurer  
Leslie Rice, Secretary

## **Chapter Committee Chairs**

Chad Kincaid, Membership  
Brian Neville, Programs  
Alex Brenner, Professional Development  
Paul Whyatt, Career Management  
Peter Brous, Academic Relations  
Jodi Colligan, Sponsorships  
Cheronne Wong, Publicity  
Ellen Boyer, National Liaison  
Rob Young, Nominations  
Leslie Rice, Diversity

# CONNECT WITH US

[WWW.FEIWASHINGTON.ORG](http://WWW.FEIWASHINGTON.ORG)

Here you will find information about upcoming events and other programs as well as links for registration, membership, sponsorship and other chapter news.

## **Finding Other FEI Members**

Connect with other FEI members through FEI Washington's Linked in and Facebook.



## **Local Chapter**

For more information, contact FEI Washington State Chapter at [office@feiwashington.org](mailto:office@feiwashington.org) or 206.524.5300.



# GETTING THE MOST

FEI provides premier benefits and services to more than 10,000 best-in-business financial professionals around the globe. In addition to national membership, you will join the Washington Chapter of FEI. Chapter participation provides opportunities to interact with peers at monthly meetings and professional development seminars to discuss topics of professional and personal interest.

From obtaining critical knowledge on emerging regulations, to networking with peers, to tapping FEI's knowledge base for career assistance, FEI members have always been dedicated to the advancement of their chosen profession and the enrichment of their own careers. FEI is a unique forum for financial executives to: network and share best practices; engage in knowledge building conferences and seminars; be represented in critical national and global policy debates; and be aligned with a culture that fosters ethical leadership. No doubt, FEI offers its members incomparable value.

## **Peer Networking**

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

## **Research and Publications**

FEI saves you time by delivering insights on emerging issues directly through actionable research and professional updates. Relevant research from Financial Executives Research Foundation (FERF) – our independent research affiliate for FEI identifies, develops and provides leading edge, practical content through objective research to FEI members. FERF has an online search service for members and provides reports and e-newsletters that are free with your FEI membership.



# FROM YOUR MEMBERSHIP

## **Financial Executive Magazine**

Financial Executive is the award-winning flagship publication of FEI, providing senior level financial executives financial, business and management news, trends and strategies to help them work better, faster and smarter. With articles that cover a wide variety of issues, from expert sources and peers.

## **Career Management Services**

FEI provides a broad range of career services as a benefit to its members and much of it is accessible online. This service is coordinated and supported by national staff and encompass many valuable components to assist you.

## **Professional Development**

FEI provides professional development opportunities — and opportunities to earn Continuing Professional Education (CPE) credits—through live, in-person conferences and webcasts. Featuring keynote addresses and roundtable discussions from industry luminaries, FEI delivers quality programming relevant to today's senior financial executives. Topics range from general finance to specific industry issues and cover emerging trends, regulatory and standards developments, leadership skills and job search skills.

## **Bring a Guest**

As a member, you can invite a qualified guest at no charge to one of our meetings. You can register your guest at the same time you sign up for the event yourself. Please contact FEI Washington's office at [office@feiwashington.org](mailto:office@feiwashington.org) to register your guest.

## **Sponsorship**

The Chapter relies on sponsors to bring our members the best possible experience. We offer annual sponsorships at \$5,500. You can find more information on sponsorship opportunities and benefits by contacting [office@feiwashington.org](mailto:office@feiwashington.org).

# GET INVOLVED

FEI Washington is always looking for members to be involved on committees. Contact FEI Washington at [office@feiwashington.org](mailto:office@feiwashington.org) to get involved.

## FINANCIALEXECUTIVES.ORG

For the latest industry news check out the headline section of FEI's home page where you'll keep current with recent developments impacting financial executives. Included are notices of the release of proposed and final rulemakings of FASB, IASB, SEC and PCAOB and key legislative and finance updates. Also provided are proprietary, "members-only" detailed summaries of proposals and final rules, summaries of board meetings and open commission meetings, so you can gain the "inside story" of developments impacting your company and your specific situation. This unique content is available as a benefit to FEI members, as a login and password is required to view detailed summaries. News changes on a daily basis, and it's suggested you check back often and/or bookmark FEI's home page.

# SPONSORS



AHT produces superior results for our clients with a “coverage first” approach based on a foundation of expertise and innovation. We are recognized leaders who focus in technology, financial institutions, healthcare, manufacturing and nonprofits risks. We are an insurance brokerage and risk management consulting firm offering Property & Casualty, Employee Benefits, Retirement and Personal insurance services for our client’s domestic and global operations.



BDO delivers assurance, tax, and advisory services throughout the country and around the globe. We offer an unparalleled commitment to meeting clients’ needs through partner involvement, deep industry knowledge, geographic coverage across the U.S., and a cohesive global network. BDO brings world-class resources and exceptional service to each of our clients.



BrunswickSt. is a boutique, woman owned recruitment firm that was started to fill a void in the recruitment world, choices. The BrunswickSt. motto of “Recruitment Your Way” originated through our founder’s experiences of working with frustrated clients and candidates who felt their options were limited when it came to working with recruiters. Areas of expertise include direct hire, interim and strategic project placements within Accounting, Finance and Operations.

# SPONSORS

## Clark Nuber PS

Regarded as a Top 100 accounting firm in the U.S. by Inside Public Accounting, Clark Nuber PS serves a broad range of clients with operations throughout the world. We serve privately held and family businesses, angel and venture-backed companies, foundations, nonprofits, the public sector, and high net worth individuals and their families.



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## KeyBank



KeyBank is one of the nation's largest bank-based financial services companies, providing deposit, lending, cash management, insurance and investment services. In addition, KeyBank provides a broad range of sophisticated corporate and investment banking products. KeyBank is committed to the communities we serve and are dedicated to helping our clients thrive.

# SPONSORS



As business lawyers, we help our clients reach their goals — from launching and securing financing for startups to guiding privately held and publically traded companies through complex financial, securities and strategic transactions. We serve as more than just legal advisors. We are partners in growth with our clients and are proud of our long-standing representation of many of the Pacific Northwest's most respected companies.



# SPONSORS



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Founded in 1937 by Charles C. Parker, Parker, Smith & Feek is one of the 60 largest insurance brokerage firms in the United States. Privately owned and headquartered in the Pacific Northwest, our firm has world-class resources with global reach. Our primary focus is the protection of our clients' assets. And, to that end, we offer business insurance solutions across multiple industry sectors. From employee benefits and surety to claims management and workers' compensation, our insurance and risk management knowledge, and service expertise are unmatched.

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Certified Public Accountants  
& Advisors

Peterson Sullivan is a leading public accounting and advisory firm based in Seattle. Founded 65 years ago, the firm provides comprehensive accounting, audit, tax, and consulting services to publicly traded companies, closely held businesses, and high-net-worth individuals. Our close to 200 professionals are committed to technical excellence and exemplary client service. For more information, visit [pscpa.com](http://pscpa.com).

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The world's leading businesses trust RGP with their most pressing change initiatives. RGP is a global consulting firm solving complex business challenges around transactions, transformations, implementations and regulations. Our specialized professionals work as an agile extension of your team, bringing real-world experience to deliver the tools and insights that navigate risk, reduce complexity and drive results. Visit: [rgp.com](http://rgp.com)



# SPONSORS

## Robert Half® Management Resources

Robert Half Management Resources specializes in providing businesses with skilled senior-level accounting, finance or business systems professionals on a project or interim basis. We do so by combining cutting-edge recruiting technology and matching algorithms with best-in-class customer service and seven decades of staffing experience. For more information visit [roberthalf.com](http://roberthalf.com) or call 1-844-402-7785.



TRUEbenefits provides practical, forward-looking and cost-effective employee benefit consulting services for leading Northwest employers. We'll help you manage risk, save time, and reduce your spend on employee benefits. We do this with passion, total transparency, and a singular focus that keeps our clients' well-being top of mind.



Ultimate Software is a leading provider of end-to-end, strategic human resources, payroll, and talent management solutions for organizations of all sizes. The Company offers its award-winning UltiPro human capital management (HCM) solution through a Software-as-a-Service (SaaS) delivery model. The Company's exclusive focus on HR, payroll, benefits, and talent management has resulted in solutions characterized by ease of use, robust built-in functionality, superior technology, and rapid activation – with a quantifiable return on investment for the greatest total business value.

# SPONSORS



USI Insurance Services helps businesses create value and manage risk by offering employee benefit health & wellness plans, retirement plan services, commercial insurance, as well as personal risk services for individuals and families. USI's Seattle office is the Northwest region headquarters, one of the largest insurance brokerages in the country.



WTIA is a trade association that serves the technology sector in Washington. We offer apprentice staffing, insurance, and retirement programs to member companies.



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