



financial executives  
international

arizona chapter



## FEI Arizona Chapter e-Newsletter

January 2017

### In This Issue

[Calendar](#)

[Dinner Program](#)

[CPE Presentation](#)

[VincentBenjamin Feature  
Article](#)

[Cigar Night - January 19](#)

### Calendar of Events

#### 2016-17 Program Season - Dinner Meetings

##### January 10, 2017

Wolfgang Koester, CEO,  
FiREapps

##### 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

### Join us for the chapter meeting on Tuesday, January 10, 2017

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

**Joint meeting with the  
German American Chamber of Commerce - Arizona  
Chapter**

#### SCHEDULE:

4:00 p.m. - Meeting Choices:

**Sponsor CPE Meeting Presented by VincentBenjamin  
Research & Development Tax Credits**

OR

#### **CAREER SERVICES MEETING**

**Market-Proofing Your Career: Building Your  
Personal Brand**

Presented by Vaco

5:00 p.m.

**Networking - Hosted Cocktails sponsored by**



6:00 p.m.

**Dinner and Program -**

May 9, 2017  
Greg Lee, CFO, Arizona Cardinals

## 2016-17 Program Season - Special Events

### January 19, 2017

Cigar Night  
Hosted by Moss Adams &  
VincentBenjamin  
See below for details.

### January 25, 2017

Behind the Scenes: Arizona  
Humane Society  
Sponsored by Lovitt & Touche'

### January 26, 2017

Family Night at the Coyotes  
Game  
Sponsored by CBIZ-MHM

### February 23, 2017

Networking Breakfast  
Discussion  
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.*

## Our Sponsors

### Academic

CliftonLarsonAllen  
McGladrey, LLC

### Platinum

Bank of America Merrill

## From a Corporate Financial Consulting Firm to a Global SaaS Company

Wolfgang Koester, CEO & Co-Founder, FiREapps

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**RSVP's due by noon on January 6, 2017**

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

**[Register Now](#)**

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

### From a Corporate Financial Consulting Firm to a Global SaaS Company

Wolfgang Koester, CEO & Co-  
Founder, FiREapps



The journey of leveraging software to move from a consulting firm to a global SaaS company addressing international finance. What CFO's should discuss when doing business internationally.

*Approved for 1 CPE credit: Field of Specialized Knowledge & Applications*

### About Our Speaker

Wolfgang Koester is the CEO and co-founder of FiREapps. He has over 30 years of extensive experience in developing and implementing financial risk management programs for Fortune 2000 companies and governments. Prior to forming FiREapps, he served as President of GFTA Trendanalysen Inc. He has been named as one of the "100 Most Influential People in Finance" by Treasury & Risk and is a member of Global Finance's "Who's Who in Foreign Exchange." Koester is a frequent speaker at university and industry events and is a regular contributor to industry publications, including The Economist, Wall Street Journal, Financial Times, Treasury & Risk and AFP Exchange, as well as networks such as Fox Business, Bloomberg, CNBC and PBS. Koester holds a Bachelor of Science degree from Arizona State University and a Master's degree in International Management from The Garvin School of International Management. He is a board member of ACI International, The Financial Markets Association, and is a former member of the editorial board of the AFP Risk Newsletter.

## 4:00 p.m. Meetings

**Research & Development Tax Credits**

Lynch  
BBVA Compass Bank  
Keyser  
Lovitt & Touche', Inc.  
Marsh USA, Inc.  
Robert Half Mgmt.  
Vaco Resources  
VincentBenjamin

### Gold

Arcadia Capital Partners  
Bank of Arizona  
BDO USA LLP  
CBIZ  
Chase  
Collins May Potenza  
Deloitte  
Eide Bailly  
Ernst & Young  
KPMG  
Moss Adams  
Protiviti  
Squartree Software  
U.S. Bank  
Willis of Arizona

### Strategic Alliance

Arizona Growth Advisors  
Phoenix CEO/CFO

## FEI-AZ 2016-17 Board of Directors

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Michelle Hoffman  
Bret Lawson  
Chris Niezgodzki  
Rachael Piergallini  
Adam Remis  
Jeff Ryskamp

Presented by Heidi R. Waller, JD, R&D Tax Manager, Eide Bailly  
Brought to you by VincentBenjamin

In 1981, Congress implemented the federal R&D tax credit to encourage companies to invest in innovation. Since then, the government has expanded the types of activities that qualify as R&D-allowing many companies to meet the criteria simply through their efforts to stay competitive. Across the country, businesses are receiving tax credits and related deductions for qualified research and development expenditures; such federal credits total more than \$10 billion annually. Most states also offer some kind of R&D tax incentive.

Claiming the credit can generate an immediate source of cash and reduction in current-year tax. It is also a permanent tax savings and can have financial statement benefits. This session will provide an overview of how the credit works, how companies may qualify for the credit, and tips for claiming the credit at both the federal and Arizona level.

*Approved for 1 CPE credit: Field of Taxes*

## CAREER SERVICES

### Market-Proofing Your Career: Building Your Personal Brand

Presented by Julie Walker, Vaco

This presentation will include:

- What CEO's look for in a CFO
- "State of the Union" on the market for CFO's in Arizona
- What it takes to sell yourself to prospective employers

*Approved for 1 CPE credit; Field of Personnel/HR*

### About Our Speakers

Heidi R. Waller, JD  
Heidi has 12 years of tax consulting experience, both in public accounting and private industry. Her experience with R&D tax credits is not only in quantitative and qualitative analysis, but also controversy support for federal and state audits. She has experience working with numerous industries including manufacturing, pharmaceuticals, software development and semiconductors. Heidi earned her Finance degree and Juris Doctor degree from Arizona State University.

Julie Walker

Julie spent the first 10 years of her career in public accounting, including 7 years with Deloitte and EY, where she led audit teams serving clients in a variety of industries and company sizes. With a desire to have a greater impact on individual lives, she spent the next 7 years as a financial consultant and Executive Director for two different non-profit organizations. Subsequent to that, she spent 5 years at a \$30B pension fund where she specialized in financial security, internal controls and

Mike Suriano  
Paul Vadovicky

## FEI Arizona Chapter Website!

[www.feiaz.org](http://www.feiaz.org)

The 2016-17 Chapter Membership Directory is 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](http://www.learningmarket.org).*

**Instructional method:** Group-Live  
**Recommended CPE Credits:** 1.0  
**Experience Level:** Basic

process improvements.

Julie is a CPA and graduated from ASU with a BS in Accounting, summa cum laude. She joined Vaco in early 2013 as an Executive Recruiter where she combines the best elements of her career -- client service and impacting individual lives.



Vincent Benjamin is a specialized recruitment and consulting firm with an extensive network of premier companies and professionals throughout the Southwest. The firm's core business is to provide contingency direct-hire search and contract placement services for employers while assisting candidates in the fields of Accounting and Information Technology. Vincent Benjamin places professionals from frontline staff to c-suite executive management positions across all major industries. The team consists of experienced recruiters who have functional experience within the specific area they serve, allowing Vincent Benjamin to provide a superior level of service to its clients. Vincent Benjamin is recognized by Inc. Magazine as one of America's Fastest Growing Private Companies for 2013, 2014 and 2015.



### You're Invited!

Come join us for an evening of cigars, scotch, and executive networking at Fox Cigar Bar. We hope to see you there!

- Date Thursday, January 19<sup>th</sup>, 2017
- Time 5:00 p.m. to 8:00 p.m.
- Location Fox Cigar Bar  
7443 E. 6<sup>th</sup> Avenue  
Scottsdale, AZ 85251
- RSVP by Monday, January 16<sup>th</sup>, 2017 [kristy.graminske@mossadams.com](mailto:kristy.graminske@mossadams.com)

### Questions?

For more information, please contact one of your Chief Cigar Officers:

**Richard Swetonic**  
(480) 366-8284  
[Richard.Swetonic@mossadams.com](mailto:Richard.Swetonic@mossadams.com)

**Michael Swiszc**  
(602) 595-9900  
[Mswiszc@vincentbenjamin.com](mailto:Mswiszc@vincentbenjamin.com)

**FEI-AZ Chapter**  
**Robin Hirth, Administrator**  
**7225 W. Oakland St., #1**  
**Chandler, AZ 85226**  
**480-496-4010**  
**[admin@feiaz.org](mailto:admin@feiaz.org)**

**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.*