



FEI Arizona Chapter e-Newsletter

March 2017

In This Issue

[Calendar](#)

[Job Opportunities to Share?](#)

[FEI-AZ Pub Crawl](#)

[Dinner Program](#)

[CPE Presentation](#)

[Leadership Summit](#)

[BBVA Compass Feature Article](#)

Calendar of Events

2016-17 Program Season - Dinner Meetings

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, March 14, 2017

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

Academic Excellence Awards Night
Sponsored by



CliftonLarsonAllen



SCHEDULE:

4:00 p.m. - Meeting Choices:
Estate Planning Strategies for Main Street & Wall Street
Presented by BBVA Compass

OR

CAREER SERVICES MEETING
Help Us Help You - Open Forum for CFO's in Transition

Facilitated by Richard Skufza, President, RMS Advisory Services, PLLC

2016-17 Program Season - Special Events

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.*

5:00 p.m.

Networking - Hosted Cocktails sponsored by



6:00 pm

Dinner Meeting

Building Excellence in the Franke College of Business

Craig Van Slyke, Dean, W.A. Franke College of Business, Northern
Arizona University

Ten Academic Excellence Awards will be given to one undergrad
and one graduate student at ASU, UofA, NAU, GCU & UofPhx.

7:30 pm

Adjourn

Our Sponsors

Academic

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Arcadia Capital Partners
Bank of Arizona
BDO USA LLP
CBIZ
Chase
Collins May Potenza
Deloitte
Eide Bailly
Ernst & Young
KPMG

RSVP's due by noon on Friday, March 10, 2017

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

[Register Now](#)

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

"Building Excellence in the Franke College of Business"

Craig Van Slyke, Dean, W.A. Franke
College of Business, NAU



In Search of Excellence, Good to Great, Start with Why, Six Sigma, and the Baldrige Awards all provide testament to the longstanding and ongoing interest in organizational excellence. Yet, we lack even a consistent definition of excellence. This presentation proposes a framework based on the idea that an excellent organization is one that consistently serves its purpose well. The framework proposes that achieving excellence in an organization requires an alignment of purpose, people, and culture. The presentation uses the example of Northern

Moss Adams
Protiviti
Squaretree Software
U.S. Bank
Willis of Arizona

Strategic Alliance
Arizona Growth Advisors
Phoenix CEO/CFO

Job Opportunities

Just a reminder that if you have a job opportunity that you would like to share with the Arizona Chapter members, please send that request to admin@feiaz.org.

If approved, we will distribute that information to the members.

FEI-AZ 2016-17 Board of Directors

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Arizona University's W.A. Franke College of Business to illustrate the concepts behind the excellence framework.

Approved for 1 CPE credit; field of Business Management & Organization

About Our Speaker

Since 2012, Craig Van Slyke has been Professor of Computer Information Systems and Dean of the W.A. Franke College of Business at Northern Arizona University. Prior to joining NAU, he was Professor of IT Management, and Associate Dean for Academic Programs at the John Cook School of Business, Saint Louis University. Prior to becoming Associate Dean, he was chair of the Decision Sciences and IT Management Department. He holds a Ph.D. in Information Systems from the University of South Florida. Dr. Van Slyke has published over 30 articles in respected academic journals including *Decision Sciences*, *Communications of the ACM*, *European Journal of Information Systems* and *Journal of the Association for Information Systems*. His fourth co-authored textbook, *Information Systems in Business: An Experiential Approach*, had its second edition published in 2015. His monthly columns in the *Flagstaff Business News* combine psychology and philosophy with his experiences to provide insights in to leadership and living well.

4:00 p.m. Meetings

Estate Planning Strategies for Main Street & Wall Street

Presented by Kevin Ryan, Senior Vice President, Wealth Strategist & Wealth ONE Manager, BBVA Compass & Annabel Whiting, Senior Vice President & Private Banker, Global Wealth Management, BBVA Compass

The presentation will review the current estate planning environment and the challenges we face due to an uncertain legislative situation. Topics covered will include the legislative environment, the importance of estate plan reviews, and various lifetime strategies and legacy strategies that can be implemented to help individuals and families achieve their estate planning goals. The discussion will also cover information concerning the federal estate, gift and income tax laws applicable to the planning for the lifetime accumulation of family wealth and the eventual transfer of that wealth to intended beneficiaries. Finally, the presentation will cover some other factors related to estate planning such as tax considerations and different approaches to gifting.

Approved for 1 CPE credit; field of Specialized Knowledge

CAREER SERVICES

FEI Arizona Chapter
Website!

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.

Keyser's First Annual FEI-AZ



Friday, March 24
3:00-5:00 pm
Scottsdale

Hosted by



KEYSER
relentless client champion

Look for details
and registration
information soon!

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

Help Us Help You -

Open Forum for CFO's in Transition

Facilitated by Richard Skufza, President, RMS Advisory Services,
PLLC

Join us for an open discussion as we collect feedback on how the
chapter can better help it's in-transition members with their job
search.

Approved for 1 CPE credit; field of Personal Development

About Our Speakers

Kevin Ryan

Kevin has over 25 years' experience in the banking and financial industry. He is a recent addition to BBVA Compass having previously worked with Merrill Lynch and SunTrust Bank serving high net worth clients in the Palm Beach and Fort Lauderdale region. Early in his career, after graduating from Colgate University, Kevin had the opportunity to play professional basketball in Luxembourg before starting as a business development officer for Chase Manhattan in New York. After several years, Kevin left New York and relocated to Charlotte, NC spending most of that time with Bank of America as a project manager.

Annabel Whiting

As part of BBVA Compass Global Wealth, Annabel draws on her 19 years of financial services and wealth management experience to best serve her clients. Prior to joining BBVA Compass Global Wealth, Annabel served as a Relationship Manager with JPMorgan's Private Bank in Phoenix responsible for developing and growing her client portfolio. Before joining JPMorgan, Annabel worked at Credit Suisse in New York, where she held several key institutional marketing roles, most recently Head of Alternative Investments Marketing. Prior to that, Annabel held a number of investor education and strategic marketing positions at OppenheimerFunds. Annabel began her career at JPMorgan Securities in New York.

Richard Skufza

Richard is an experienced strategic and financial executive with a unique combination of marketing and financial experience. He is prepared to share and leverage his extensive strategic financial and management leadership experience with a select clientele of small to mid-sized professional services businesses. As President of RMS Advisory Services, PLLC he is committed to counsel, encourage and influence business owners with excellence, compassion and integrity - transforming their businesses into great companies. As their trusted advisor, he can serve as an outsourced CEO/CFO/Controller, providing operational, accounting and other financial advisory services.

As the former Executive Vice President and Chief Financial Officer of LaneTerraever, Richard Skufza offers a unique combination of marketing and finance discipline for his clients. For more than 30 years in the advertising, marketing and design industries, Richard has embraced the financial stewardship of impressive brands, culminating in orchestrating the merger of E.B. Lane and Terraever to create the agency of the future with over 120 employees and \$100 million in capitalized billings.

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.

FEI-AZ Chapter
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fei
 FINANCIAL LEADERSHIP
SUMMIT
 APRIL 23-25, 2017 • ANAHEIM MARRIOTT, CA

EARLY REGISTRATION THROUGH MARCH 26

Members • \$1,045
Nonmembers • \$1,245
FEI/FERF Leaders • \$895

JOIN FEI AND ATTEND SUMMIT FOR \$894.

www.financialexecutives.org/summit

BBVA Compass

BBVA Compass is a leading U.S. banking franchise with operations throughout the Sunbelt Region and ranks among the top 25 largest U.S. commercial banks based on deposit market share. Under the brand name BBVA Compass, we operate 684 branches in Alabama, Arizona, California, Colorado, Florida, New Mexico and Texas.

BBVA Compass ranks among the largest banks in Alabama (2nd), Texas (4th) and Arizona (5th). BBVA Compass has been recognized as one of the leading small business lenders by the Small Business Administration and was recently awarded the 2013 Celent "Model Bank Award" for its new core banking platform.

Its parent company, BBVA, is a customer-centric global financial services group founded in 1857. The Group has a solid position in Spain, is the largest financial institution in Mexico and has leading franchises in South America and the Sunbelt Region of the United States. BBVA ordinary shares are traded through the Madrid Stock Exchange under the symbol BBVA and American Depositary Shares

(ADS) are traded on the New York Stock Exchange under the symbol BBVA.

FEI Arizona Chapter, 7225 W. Oakland Street, # 1, Chandler, AZ 85226

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