

### FEI Mission:

Our Chapter's mission is to be the premier organization for financial executives in the Austin area. The Chapter promotes fellowship and interaction among its members and has active programs to enhance professional knowledge and qualifications.

### chapter leaders

#### President

Mr. Michael Moulton  
*North America Director of Finance, ALK-Abello*

#### Executive VP (president-elect)

Mr. Mathew King  
*CFO, Premier Family Physicians*

#### VP Membership

Mr. Gary Chetzron  
*Independent Finance Business Consultant*

#### VP Programs

Mr. Mathew King  
*CFO, Premier Family Physicians*

#### VP Communications (Secretary)

Mr. Zac Fellabaum  
*CFO/COO, Nulo Pet Foods*

#### VP Finance (Treasurer)

Mr. Derek Pennant-Jones  
*Director of Finance, Celling Biosciences*

#### VP Career Services

Mr. Nick Dawe  
*Treasury Director, Hanger, Inc.*

#### VP Sponsorships

Mr. Lewis Rhoden, *President & CEO, Techline*

#### Immediate Past President

Mr. Dean Dresser, *CFO, Jimmy Evans Company*

#### Directors at Large

Ms. Robin Campana, *CFO, Bulldog Solutions*  
Mr. Dean Dresser, *CFO, Jimmy Evans Company*  
Mr. David Mehok, *CFO, CLEAResult Consulting, Inc.*  
Mr. Kit Mellem, *CFO, BuildASign*  
Mr. Don Neville, *Chairman/CEO, TerraHydroChem, Inc.*

#### Chapter Administrator

Ms. Jenny Garcia, *FEI Austin Chapter*  
P.O. Box 5128  
Austin, Texas 7876  
feiaustin@gmail.com / (512) 587-6972



### platinum partners



### gold partners



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



**austin chapter**

*connecting financial executives*

Breakfast Meeting

### "Annual Accounting Update"

**Lesley Hargraves, Audit Partner, Maxwell Locke & Ritter**

**Sara C. Maxwell, Audit Partner, Maxwell Locke & Ritter**

**Ann Stepan, Tax Partner, Maxwell Locke & Ritter**

Austin Country Club

Tuesday, January 16, 2018

## FEI vision

FEI will continue to be the professional association of choice for the corporate finance executive. We strive to be the most contemporary, dynamic and proactive organization of its kind. We are a powerful network centered on a vibrant Internet community and local meetings. FEI is member-service oriented, with value for dues a top priority. Indeed, the cost of membership is dwarfed by the cost saving ideas and value-building themes that accrue to our members through their participation in FEI. We strive to be the eyes and ears of the typical finance officer facing the day-to-day challenge of enhancing his or her shareholders' investment. We help members anticipate and react to change, acquire new resources to enhance shareholder value, and build the personal skills needed to further their careers. We do this by providing information through diverse forms of communication, knowledge of evolving trends and issues and high-quality programs. We help to identify new opportunities for peer networking, and provide for effective advocacy through representation before legislators and regulators.

"FEI has connected me with several other CFOs as well as key service providers in the Austin area. The connections have allowed me to meet and learn from other finance executives who have faced or are facing similar challenges to our organization.

The advice from these members along with my overall FEI membership have been tremendously valuable, both personally and professionally." "

-Brian Hack  
CFO, Beanitos  
Member since 2014

## upcoming FEI Austin events:

**February 20, 2018**  
Breakfast Meeting  
(Austin Country Club)  
**Justin Foster, Co-Founder**  
*root + river*

**March 20, 2018**  
Dinner Meeting  
(Archer Hotel)  
**Johnny Heiselberg, CEO**  
*Austin Eastciders*

## meet the speakers



**Lesley Hargraves,**  
**Audit Partner,**  
**Maxwell Locke & Ritter**

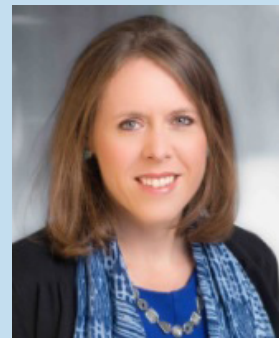
Lesley Hargraves joined Ernst & Young's Austin office in 2002, where she served privately-held companies operating in various industries, with a focus on technology and professional services. Lesley joined Maxwell Locke & Ritter in February 2009, where she continues to focus on technology and professional services.

**Sara C. Maxwell,**  
**Audit Partner,**  
**Maxwell Locke & Ritter**

Sara Maxwell joined PricewaterhouseCoopers' Houston office in 2000 where she served international, publicly-held companies operating in various industries, primarily chemicals. A Certified Public Accountant, Sara joined Maxwell Locke & Ritter in 2006 and focuses on middle market clients, primarily in manufacturing, consumer products and retail and wholesale distribution, as well as leading the SOC examination practice.



**Anna Stepan,**  
**Tax Partner,**  
**Maxwell Locke & Ritter**



Anna Stepan is a Certified Public Accountant and joined Ernst & Young's Austin office in 2004 and Maxwell Locke & Ritter in November 2007. Anna provides tax compliance and consulting services to a variety of businesses and their owners, with a primary focus on the technology and real estate industries and the U.S. tax aspects of international operations.

## membership application

I hereby apply for membership in Financial Executives International (please select one below).

**\*\*No Chapter membership fee!\*\***

**Executive: \$495\***

**Academic: \$225**

**In-Transition: \$225**

**Government / Military: \$225**

### business information

name \_\_\_\_\_

title \_\_\_\_\_

company name \_\_\_\_\_

company address \_\_\_\_\_

city / state / postal code / country \_\_\_\_\_

business phone \_\_\_\_\_

business fax \_\_\_\_\_

business e-mail (required) \_\_\_\_\_

### Nature of Entity

Public  Private  Non-Profit  Other

### Industry:

SIC No. \_\_\_\_\_

### Annual Revenue

Less than \$10 Mil

\$10 to \$99 Mil

\$100 to \$499 Mil

\$500 to \$999 Mil

\$1 to \$5 Bil

More than \$5 Bil

### Areas of Responsibility

\_\_\_\_\_

### personal information

name \_\_\_\_\_

home address \_\_\_\_\_

city / state / postal code / country \_\_\_\_\_

home phone \_\_\_\_\_

home fax \_\_\_\_\_

email (required) \_\_\_\_\_

**Preferred Mailing Address**  Business  Home

**Preferred Email Address**  Business  Home

**Designation**  CPA  CMA  CFA

Other: \_\_\_\_\_

**Degree**  Bachelors  Masters  Doctorate

**Are you a member of any other professional association?**  ACG  AFP  AICPA

IIA  IMA  JICPA  JACFO

CFA Institute (AIMR)

Other: \_\_\_\_\_

### How did you learn about FEI?

FEI Member (Name \_\_\_\_\_)

Direct Mail  Magazine / Newspaper

Chapter Meeting  Colleague  E-mail

Other: \_\_\_\_\_

**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 \_\_\_\_\_

Date \_\_\_\_\_

(Membership is granted on an individual basis and is non-transferable. Dues are not refundable.)

### payment options

Enclosed is my check  Please invoice

Please charge \$ \_\_\_\_\_ to my  Visa®  MasterCard®  Amex®  Discover®

Card #: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Cardholder's Name: \_\_\_\_\_

Signature: \_\_\_\_\_

**\*Member-Get-A-Member join special runs through April 30, 2018. Please contact Jenny Garcia at feiaustin@gmail.com for more information.**