

A Letter from the President



I can't believe another year is almost completed. I have had a great time meeting and talking to all of you. We have had a busy and engaging year. We added a few new events and expanded on some existing ideas. Listed below are a few of our highlights:

- Three Leadership Lunches where we learned about change management, body language and emotional intelligence.
- An Energy Special Interest Group that started with discussions on how the new leasing standard impacts upstream, midstream and downstream energy companies.
- A Technology Special Interest Group began by discussing Block Chain.
- Quarterly Happy Hours allowed members to get to know each other in a more relaxed and fun setting.
- Partnering with the University of Houston Bauer College of Business for our annual FEI's CFO University. Additionally, members have enjoyed discounts on Bauer College classes.
- Partnered with NACD for their annual Non-Profits luncheon. Our career management committee started a database for interest in serving on a Non-profit Board.
- Joined the Greater Houston Partnership as an organization in order to enhance the FEI brand.

I am very interested in getting your feedback on which of these events were valuable to you and how we can make them more impactful to you. Please contact me at akaesermann@hilcorp.com with your thoughts. We would like to expand the Special Interests Groups (SIGS) into other areas of focus. Some ideas currently being circulated are SEC Reporting, Treasurers Group, Manufacturing, and Healthcare. We need members' participation in ideas for future SIGs and helping to coordinate them. Our goal is to push these into locations more convenient to our members. We are also looking for member involvement in the planning and topic generation for these groups. This is a great way to get more engaged with our membership and widen your current network of professionals.

Our dinner presentation on May 16 will be a panel of speakers discussing trade and other current events in Washington DC from diverse perspectives. It should be a robust event! Thanks to our Title Sponsor, Deloitte, who has brought together this intelligent, well-informed panel including Bill Womack and Patrick Givens.

Our professional development session sponsored by Wells Fargo includes Kelly Landreth and Paul Wolfert from Wells Fargo's Investment Banking and Capital Markets team for a presentation and discussion on the state of the M&A and capital markets with a focus on:

- Providing an overview of trends driving M&A activity from the perspective of both buyers and sellers;
- Sharing an update on developments across the public and private debt and equity capital markets; and
- Discussing characteristics lenders focus on in an evolving regulatory and operating environment.

Our dinner meeting Gold sponsor is CFO Suite. Please continue to support our sponsors, who help make our chapter events possible.

We are getting very close to our annual FEI's CFO University in partnership with the University of Houston C.T. Bauer College of Business on May 18th. There are very few slots left so don't delay in signing up. It is always an informative event.

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Dinner Meeting

May 16, 2017
Houston Country Club

4:30 Professional Development Session

5:30 Social Hour

6:30 Dinner Session



Want to win a gift basket?

Attend the Monthly Meeting's Professional Development Session to be entered for our prize drawing. Must be present to WIN!

Look forward to seeing you at the next Professional Development Session!

Register online by May. 12th. feihouston.org

Sponsored by:



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May 16, 2017 Dinner Meeting

“Panel Discussion of Current Legislative Topic in Washington”

DINNER SESSION

Bill Womack, Deloitte, Paul Rogers, Deloitte, and Patrick F. Givens, Deloitte

Biography - Paul Rogers

Paul has 25 years of experience with Deloitte, providing audit and advisory services primarily to multinational companies in the Oil & Gas and manufacturing industry sectors. Paul serves a number of Deloitte's most significant and complex clients as the partner responsible for leading our global professional service teams. In addition, Paul serves as a senior leadership partner to several of our audit and advisory clients. Paul is the national managing partner of assurance offerings and a member of the US audit executive leadership team. Paul has previously served as the audit leader for the Americas Region and has also served as the US audit and advisory manufacturing industry leader.



Biography - Bill Womack

Bill Womack has over 17 years working in the congressional space. For the past eight, he has served as a federal lobbyist in the Deloitte Public Policy and Government Relations Affairs and Public Policy office. In this role, he is responsible for advocating for Deloitte's business interests before Congress. He focuses on the Firm's Federal

2016-2017 Season

UPCOMING EVENTS

May 4 - Leadership Series

May 12 - Technology Special Interest Group Meeting

May 16 - Dinner Meeting

May 18 - CFO University

June 1 - Golf Tournament (Rain Date)

practice with an emphasis on the healthcare and civilian sectors, but assists with any Firm needs that may arise. He develops and executes legislative strategies, to include coordinating activities of outside lobbying firms and working with industry coalitions. On behalf of the Firm, he also builds and maintains relationships with key Republican and Democratic members of the House and Senate.



Biography - Patrick F. Givens

Patrick serves as a managing director of government relations for Deloitte LLP. In this capacity, he advises the firm's leadership on emerging political and regulatory trends impacting the partnership. Drawing on his experience and deep network in Washington, D.C., he develops and executes legislative strategies on Capitol Hill in order to advance the firm's business interests.



For full bios, please visit our website: feihouston.org.

“State of the M&A and Capital Markets”

PROFESSIONAL DEVELOPMENT SESSION

Kelly Landreth, Wells Fargo and Paul Wolfert, Wells Fargo

Please join Kelly Landreth and Paul Wolfert from Wells Fargo's Investment Banking and Capital Markets team for a presentation and discussion on the state of the M&A and capital markets with a focus on:

- Providing an overview of trends driving M&A activity from the perspective of both buyers and sellers;
- Sharing an update on developments across the public and private debt and equity capital markets; and
- Discussing characteristics lenders focus on in an evolving regulatory and operating environment.

Biography - Kelly Landreth

Kelly Landreth is a managing director in the Regional Investment Banking group at Wells Fargo Securities, where she provides strategic advisory and capital raising services to middle market companies throughout the Southern region of the United States. She is based in Dallas.

Kelly joined Wells Fargo through a predecessor firm and has nearly 15 years of investment banking and corporate finance experience. Kelly opened the New York office of the Middle Market Group in 2010 and assumed the role as head of the Southern region in 2016.



Biography - Paul Wolfert

Paul Wolfert is a vice president in the Regional Investment Banking group at Wells Fargo Securities, where he provides strategic advisory and capital raising services to middle market companies throughout Texas, Oklahoma and Louisiana. He is based in Houston, Texas.

Paul has nearly 10 years of investment banking and corporate valuation experience.

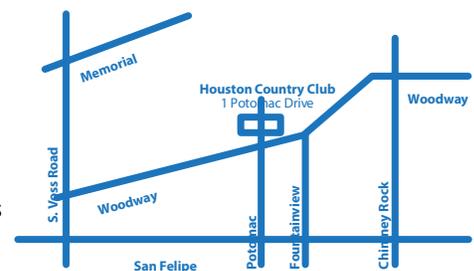


Meeting Directions

Houston Country Club
1 Potomac Drive
Houston, TX 77057

Register online:
feihouston.org

Registration closes
April 7, 2017.



UH Bauer Executive Education

BAUER ALUMNI

Join Executive Education Membership for Bauer College of Business Alumni and choose one Open Enrollment program in 2017 for just \$200 (does not include Women in Leadership). Learn more by following this [link](#).

STAY AT THE HILTON HOTEL ON THE UNIVERSITY OF HOUSTON CAMPUS WHILE TAKING YOUR EXECUTIVE EDUCATION CLASSES.

Walk across the street to the Bauer College of Business to attend your class and after class take the rail to downtown Houston for food and entertainment or stay on campus on do some rock climbing at the UH fitness center. <http://www3.hilton.com/en/hotels/texas/hilton-university-of-houston-HOUUHHF/index.html>.

****All Executive Education classes lasting one or more days include complimentary breakfasts and lunches.****

BAUER EXECUTIVE EDUCATION CLASSES CAN BUILD YOUR ABILITY TO LEAD ORGANIZATIONS.

Digital Marketer Certificate – Earn your certificate in digital marketing by completing the following 5 courses (courses may be taken individually as well):

May 15-18 2017 [More Information >](#)

► **Search Engine Optimization:** Search engines have changed the way people get information and make purchase decisions. When customers search the web for your product or service, will they see your company in the results? Will they click through to your website? [Course details >](#)

► **Search Engine Advertising:** The two legs of a successful search marketing program are 1) using search engine optimization (SEO) to enhance your position in organic search results, and 2) managing pay-per-click (PPC) advertising to ensure the profitability of paid search results. [Course details >](#)

► **Content Marketing:** Content marketing is the backbone of digital marketing. According to the Content Marketing Institute, 93% of B2B marketers have embraced content marketing over traditional advertising. Content marketing, through its focus on providing timely and relevant information to your target market, fosters better relationships with potential buyers and moves them through the buying process at their own speed. [Course details >](#)

► **Social Media Marketing:** In today's economy, companies that are behind the curve in social media are putting themselves at a competitive disadvantage. Successful companies need effective and profitable social media strategies. After this course, you will be able to use social media tools and platforms to promote and position your brand. [Course details >](#)

► **Web Analytics:** Successful marketing requires a unique blend of art and science. As we move from Web 2.0 to Web 3.0 and beyond, the wealth of data and information available to marketers has increased exponentially. This course introduces you to web analytics and helps you create a comprehensive strategy for measuring your inbound marketing activities. [Course details >](#)

Blue Ocean Strategy – Tap into uncontested markets and learn how to eliminate competition with this two day workshop

May 23-24, 2017:

This course provides participants with a foundation in Blue

Ocean Strategy using experiential learning techniques that can be applied to almost any company in any industry. Blue Ocean Strategy is a set of systematic tools that use an analytical framework to allow companies to break away from the red ocean of bloody competition and create a Blue Ocean of uncontested market spaces in which their competition is irrelevant. Based on the National best-selling book by Professors Kim and Mauborgne, Blue Ocean Strategy takes years of research in dozens of industries and demonstrates how a specific, well-executed strategy can move companies ahead of the competition. [More Information >](#)

If you are a University of Houston Alumni, enjoy a 15% discount on any Bauer Executive Education class. For more information contact Brittney Edwards at bedwards@bauer.uh.edu.

AASAVE15 - 15% discount for all FEI members

AASAVE30 - 30% discount for FEI member groups of 10 to 19 attendees

AASAVE55 - 55% discount for FEI member groups of 20 or more attendees.

Please visit our website at <http://www.bauer.uh.edu/executive-education/> for more details on courses.

FEI Annual Golf Tournament

RAIN DATE
June 1
2017
BLACK HORSE
COUNTRY CLUB
register today
Visit our website
for information
feihouston.org

President's Letter (continued)

Recently four members of the FEI Houston Leadership team attended the National FEI Summit in California. We came away with lots of new ideas and fresh perspectives to bring to our individual organizations, but also to the Houston chapter. We formed a close alliance with the Austin, Dallas, Fort Worth and San Antonio chapters who have volunteered to help us coordinate next year's National Summit being held right here in Houston Texas!

I exit this year as President hoping I have made the FEI experience impactful to you, our members, and look forward to supporting next year's President and Leadership team in making FEI Houston even more rewarding and important to you!

Regards,
Ann Kaesermann
President – FEI Houston



2016-2017 FEI Houston Mission Statement & Goals

MISSION:

Be the premier resource for Houston financial executives by offering high quality educational and leadership development programs and resources to inquisitive leaders that help advance their careers and allow them a voice in financial matters important to Houston businesses.

GOALS:

- Maintain and enhance the value of the FEI brand by focusing on quality – quality members, programs and sponsors
- Be relevant to members
- Offer high quality programs and resources that help develop current and future financial officers
- Develop high quality and engaged sponsors to assist the Chapter financially, help identify programs and speakers, and help recruit new members
- Make FEI relevant and known in the community through involvement in Houston financial matters; be the voice of the financial community
- Run an effective, professional, and fiscally sound Chapter operation
- Give back to the community through our own foundation and in other ways in which our members personally choose



NEW MEMBERS

Jose Bayardo
National Oilwell Varco

Shradha Poddar
GE Oil & Gas

Mai Duong
CVR Energy

Cesar Rocha Cantu
Trinidad Drilling Ltd.
(TDG)

Michael Lambright
General Electric

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