financial executives international
houston chapter
www.feihouston.org

FEI Houston Chapter Newsletter

August 2019

FEI: The primary resource for financial executive education and leadership development and the principal avenue to influence financial matters in Houston

A Letter from the President



I hope everyone is having a great summer and I hope you have attended our Summer Breakfast Series. We have one remaining event on August 21 where Bank of America is the strategic partner and Nicholas Giorgi will present on China, Trade, Tariffs and Other Market Drivers. Click here to register for the August breakfast. This should be a great follow-up to the July 17 presentation on the economy and Federal Reserve expectations.

While we dial back the number of FEI events in the summer the committee volunteers have been hard at work planning events for the fall of 2019. Our dinner speakers are all set and we are working on additional Leadership and Executive Development Lunches and breakfast events. Our dinner programs kick off on September 17 with Ellen Coopersmith leading a presentation on Decision Framework – Effective Decision Making in a Dynamic Environment. Ellen has a lot of experience working with large energy, defense and pharmaceutical companies using a practical decision quality process to address complexity, ambiguity and uncertainty inherent in many investment decisions and improve decision making. You can register for the September dinner here. October 15 our dinner speaker is James Scott, associate professor of Statistics at UT Austin and author of AIQ – How People and Machines are Smarter Together. James will give us some practical insights into the future of artificial intelligence and debunk a few myths along the way. This is not the statistics you remember from college days and I guarantee it will be lively, interesting and you will improve your AI, IQ (AIQ). October 15 registration link is here.

The 2019 – 2020 dinner meeting schedule is set, and registration for all dinner meetings is open on FEIHouston.org.

- September 17, 2019
- October 15, 2019
- November 19, 2019
- January 21, 2020
- February 18, 2020 (50th anniversary Academic Honors Day)
- March 31, 2020
- April 21, 2020
- May 12, 2020

As always, our membership and strategic partners are critical to our success as a chapter. I encourage you to invite a fellow finance executive to an event as a prospective member. They will enjoy networking with peers, presentations and topics they won't see at other venues and we continue to work to provide additional value to each member. We will have over 30 events this fiscal year, all free to members, and provide over 40 hours of CPE.

I want to extend thanks to our many strategic partners for their ongoing support and encourage you to consider them when you have an opportunity for professional services. I also want to welcome a few new strategic partners to the Houston Chapter: Bank of Texas (Gold), GLO CPA's (Gold), Trenegy (Emerald), EY (Platinum) and PNC Bank (Platinum). RGP has also upgraded from Gold to Emerald for the coming year. If you have a need

(Continued on Page 2)

Breakfast Meeting

August 21, 2019

The Junior League of Houston

7:15	**Check In and Networking**
7:30	**Breakfast**
7:45	**Presentation Starts**
9:00	**Presentation Concludes**

Register online by Aug. 16th. feihouston.org

Sponsored by:

BANK OF AMERICA



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!

FEI Houston Chapter Newsletter

Breakfast Meeting ..... Page 2
New Members ..... Page 3
Mission & Goals ..... Page 3
FEI Sponsors ..... Page 3
Officers & Committee Chairs ..... Page 3

financial executives international
houston chapter

August 21, 2019
Summer Breakfast Series

"China, Trade, Tariffs and Other Market Drivers"

BREAKFAST SESSION

Nicholas Giorgi, Bank of America Merrill Lynch

Nicholas Giorgi is a Vice President and Investment Strategist supporting Bank of America Private Bank and Merrill for the Chief Investment Office (CIO) within Bank of America Corporation. In this role, he is responsible for providing investment, portfolio positioning and implementation guidance promoting top of the house thinking to advisors and clients across the wealth management businesses. He is a frequent contributor to CIO thought leadership publications.

Nick graduated with a finance degree from the University of Colorado and received his Master's in Business Administration (MBA) from Georgetown University's McDonough School of Business. He is a Chartered Financial Analyst (CFA) charter holder and is a member of the New York Society of Security Analysts.

Topics to be covered:



- Domestic Economic conditions
- Global Economic conditions
- US/China Trade War
- Other market drivers

A Letter from the President (continued)

but don't know the contact, I am glad to facilitate an introduction to any of our strategic partners.

2019-2020 Season
UPCOMING EVENTS

Sep 17 - Dinner Meeting

Oct 15 - Dinner Meeting

Oct 24 - Luncheon

Nov 19 - Dinner Meeting

Jan 21 - Dinner Meeting

National Topics:

FEI National has three webinars planned for August covering banking relationship management, lease accounting impacts to the balance sheet and how accounting and finance can drive digital transformation. You can find all of the National webinars by following this link. There is also new research on effective project leadership, cybersecurity vs. cyber resilience and developing a data strategy. These and additional National research can be found here.

As I mentioned last month, FEI Connect is a tool that allows you to seek answers or feedback from other members across the entire National membership on situations or alternatives that you may not have experienced. You can post questions or provide feedback or answers to other members. I participated in a discussion in July on key factors to consider when expanding your footprint to a new country or if your company is going international for the first time. Over 10 members from around the US provided their insights on critical issues for this topic. If you haven't tried it, give it a look at the link here and sign up for the daily emails. There is also an app for iPhones and Android.

Follow us on LinkedIn:

We now have over 240 followers on LinkedIn and 60,000 LinkedIn members have viewed FEI Houston content and events. When you follow the Chapter LinkedIn page you now have a connection with other members through this important networking tool. You can follow the Chapter LinkedIn page here.

U of H Mentorship Opportunity

The past several years the Houston Chapter has engaged with the Bauer Business School at the University of Houston. Starting last year, I became a mentor to an MBA student. This was incredibly rewarding to me and I enjoyed every meeting with my mentee. He asked some great questions about practical application of some of his class topics, sought guidance on summer internship alternatives and I learned about metallurgy (his undergrad was in engineering). If you have an interest, it looks like they need a few more mentors for the coming school year. Send me an email or keep an eye out for more information on the program that we will email during the coming month or so.

On behalf of your Chapter leadership team, I thank you for your support and participation in our Chapter during the upcoming year. If you have any suggestions comments or just want to get together don't hesitate to reach out to me at jhbriscoe@aol.com.

As the summer comes to a close, I hope you are able to get some much-needed time off with family and friends, and I hope to see you at an upcoming Chapter event.

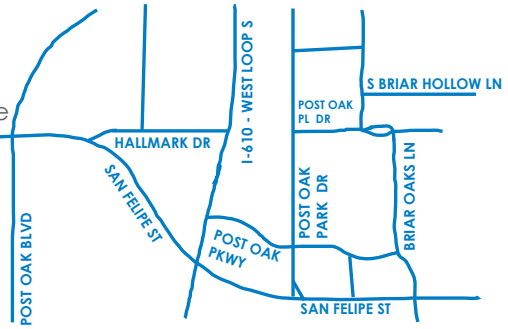
John Briscoe
FEI Houston Chapter
President 2019 – 2020

Meeting Directions

The Junior League
of Houston
1811 Briar Oaks Lane
Houston, TX 77027

Register online!

Registration closes
August 16, 2019.



MEETING

FEI HOUSTON



2019-2020 FEI Houston Mission Statement & Goals

MISSION:
FEI's mission is to advance the success of senior-level financial executives, their organizations, and the profession.

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

financial executives international
houston chapter

NEW MEMBERS

2019-2020 STRATEGIC PARTNERS

Secure your FEI Sponsorship today!
Contact: Tony Maresca, tmaresca@bepms.com

TITLE
Deloitte

PLATINUM
Addison Group
Bridgepoint Consulting
Alvarez & Marsal
Bank of America
BDO
Moss Adams
PKF
Robert Half
Sense Corp
Siegfried Group LLP
Sirius Solutions
Vaco

EMERALD
BBVA Compass Bank
Lockton
Sense Corp

GOLD
Citi
Donnelley Financial Solutions
Houston Business Journal
KPMG
RPG
Stout
Vinson & Elkins
Wells Fargo
Whitley Penn

FEI HOUSTON SCHOLARSHIP FOUNDATION
Donnelley Financial Solutions
ExxonMobil
Jambrina CPA
Moss Adams
Mutual of Omaha Bank
PWC

FEI Houston Scholarship Foundation

Want to make a donation to the Foundation, review audited financials or see scholarship recipients for this year?

View our website at
http://feihoustonfoundation.org

FEI Houston Officers and Committee Chairs

President
John Briscoe

Immediate Past President
Robert Schmitz,

President Elect
Tony Van Slyke,
Goodwill Industries of Houston

Treasurer
Allen D. Gibson

Secretary
Scott Skrabanek
Plantgistix

Program Chair
Meg Britton

Sponsorship Chair
Kirk Sprunger

Career Management and Leadership Chair
Kathleen McAllister

Happy Hours Chair
Darlene Cano

Young Leaders Chair
Darlene Cano

Membership Chair
Todd Ruden

Membership Vice Chair
Debbie Clark

Academic Relations Chair
Steve Abercia
Robert Half Management Resources

FEI National Liaison
Marcus Jonesi
Manti Tarka Permian

CFO University Chair
Andrew B Nobbay,
Occidental Petroleum Corp

Communications/Branding Co-Chair
Eric Khan,
BBVA Compass Bank

Communications/Branding Co-Chair
Josh Tabin
MosaicCFO

Audit Committee Roundtable
Frances Hawes

GHP Liaison Chair
Scott Skrabanek,
Plantgistix

North/West Houston Chair
Rob Schmitz

Social Dinner Chair
Paul Marsh

FEI Houston Chapter Directors

Chuck Fischer
K. Scott Gray,
Luby's Fuddruckers Restaurants LLC
Frances Hawes
Energen Corp. & Archrock Inc.
Marcus Jonesi
Ann Kaesermann
Eric Khan,
BBVA Compass Bank
Tony Maresca,
BullseyeEngagement LLC
Phil McCormick
Mark Vise,
Utegration