#### **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**

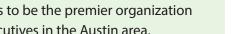
Mr. Dean Dresser, CFO, Jimmy Evans Company

#### **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, TerraHyrdroChem, Inc.

#### **Chapter Administrator**

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









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### gold partners























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## austin chapter

connecting financial executives

**Breakfast Meeting** 

**Greylen Erlacher Mardy,** Vice President, Vanbridge LLC

and

Jenifer Smith, Partner, DLA Piper

"Transactional Risk Insurance: A Risk Transfer Mechanism"

Renaissance Hotel

Tuesday, October 17, 2017



### **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:

November 21, 2017

Breakfast Meeting (Austin Country Club)

Rajiv Bala, Principal, S3 Ventures; Clayton Christopher, Managing Partner, CAVU Venture Partners; Venu Shamapant, General Partner, Live Oak Venture Partners; and Bob Smith, Principal, Bridgepoint Consulting (Moderator)

> December 5, 2017 Members and Sponsors Holiday Party (By Invitation Only)

### meet the speakers



#### Greylen Erlacher Mardy, Vice President, Vanbridge LLC

Greylen Erlacher is a Vice President and coordinates the Transactional Risk team for Vanbridge LLC. The transactional team solicits, crafts and implements insurance solutions that address both the financial and transaction risks faced by financial sponsors or corporate clients when executing a merger or acquisition. Solutions include bespoke Representation & Warranties policies,

tax insurance, and litigation buyout policies. Greylen's expertise extends to the placement of general partnership liability insurance placements for private equity funds, hedge funds and other alternative asset managers as well as the placement of management liability solutions for portfolio companies.

Greylen joined Vanbridge in 2010. Prior to that, she served as a Risk Management Associate and Leadership Pipeline Program Participant at Wells Fargo. There, she analyzed, designed and executed executive liability and casualty insurance programs for national account and financial institution clients. She has completed the INS Series: INS 21, INS 22, INS 23. Greylen graduated from the University of Wisconsin, Madison with a B.A. in Global Political Economy and French.

#### Jenifer Smith, Partner, DLA Piper

Jenifer Smith serves as outside corporate counsel to public and private companies, advising them on significant corporate transactions, including cross-border and domestic mergers and acquisitions, public offerings and private equity and venture capital financings. In addition, she coordinates teams of multidisciplinary lawyers and accountants to assist clients with mergers, acquisi-



tions and divestitures, including cross-border transactions and complex global post-acquisition integration and restructurings. Jenifer also advises boards of directors and management teams regarding corporate governance issues as well as compliance with securities laws and SEC disclosure requirements. She works with companies in a wide range of industries, including software, gaming, life sciences, telecommunications, clean energy, manufacturing, transportation, retail and travel, among others.

Jenifer graduated with bachelor's degrees in Accounting and Management Information Systems and a Master's Degree in Accounting from The Ohio State University, and holds a law degree from the University of Texas at Austin.

### membership application

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

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

☐ In-Transition: \$225

☐ Executive: \$399\*

☐ Academic: \$225	☐ Government / Military: \$225
<b>business</b> information	<b>personal</b> information
name	name
title	home address
company name	city / state / postal code / country
company address	home phone
city / state / postal code / country	home fax
	email (required)
business phone	Preferred Mailing Address
business fax	Preferred Email Address ☐ Business ☐ Hor
business e-mail (required)	<b>Designation</b> □ CPA □ CMA □ CFA □ Other:
Nature of Entity  Public	<b>Degree</b> □ Bachelors □ Masters □ Doctora
Industry:SIC No.	Are you a member of any ofther professiona
Annual Revenue  ☐ Less than \$10 Mil ☐ \$500 to \$999 Mil	association?   ACG AFP AICP  IIA MA JICPA JACFO  CFA Institute (AIMR)
□ \$10 to \$99 Mil □ \$1 to \$5 Bil	□Other:
□ \$100 to \$499 Mil □ More than \$5 Bil	How did you learn about FEI?
Areas of Responsibility	☐ FEI Member (Name ☐ Direct Mail ☐ Magazine / Newspap ☐ Chapter Meeting ☐ Colleague ☐ E-mai ☐ Other:
	ousiness and personal conduct shall at all times lith FEI's Code of Ethics.
Signature	Date
(Membership is granted on an individal basis o	and is non-transferable. Dues are not refundable.)
paymentoptions ☐ Enclosed is my check ☐ Please invoice	
☐ Please charge \$	a® □ MasterCard® □ Amex® □ Discover®
Card #:	Expiration Date:
Cardholder's Name:	

Signature:

<sup>\*</sup>Member join special runs through October 31, 2017.