

### 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

**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, acquisitions 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!\*\*

- Executive: \$399\***  
 **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  \$500 to \$999 Mil  
 \$10 to \$99 Mil  \$1 to \$5 Bil  
 \$100 to \$499 Mil  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 join special runs through October 31, 2017.