

CFO Roundtable Seeking Additional Members

Dan Loichinger | Facilitator

Are you challenged with the ever-expanding responsibilities you have as a CFO? Do you have someone to confide in for the non-financial responsibilities and challenges you face? What if you had a group of colleagues from non-competing companies who were available to help you meet the challenges head on and shape your future plans?

Over the past few months, a small group of FEI members have been doing just that as they launched FEI's CFO Roundtable, pulling members from private companies around the Madison area. FEI leadership has been impressed with the quick launch and strong commitment of members.

The roundtable now has 9 members and would like to build the membership to 14 by the end of the year, now that group has worked out its purpose, schedule and member commitments. Having additional members will bring great perspective, experiences, a critical mass, and provide the insight needed for member decision-making.

All the credit goes to the original founders: Brad Simonson, Jaeckle Distributors; Marla Frank, Frank Productions; and Jeff Audretsch, Bell Laboratories, who cast the vision for the group. From there, senior directors and CFO's of other non-competing companies joined: Sani-Matic, H & H Group Holdings, Madison Investment Advisors, Urban Land Interests, Agrace, and Wind River Financial have joined.

"I have been most impressed with the skill and experience level the members are bringing to the table and the learning that is taking place as a result."

*Brad Simonson
CFO | Jaeckle Distributors*



The membership has met for more than half a year now, and has a monthly schedule planned out for a half day afternoon meeting, including a planned retreat in Lake Geneva this August. Members are seeing the benefits of membership and are building the trust needed to share and plan out their strategies for success.

If you are interested in learning more, reach out to any of the founders, or our facilitator, to learn more. You are welcome to join us for a meeting to see the process in action. From there, it's a short application and payment to join. Members must be in or join FEI, then

pay the \$2,000 for the initial 12-month membership in the CFO Roundtable.

Now that tax season is over, we look forward to hearing from you, answering your questions, and seeing if this is the next learning opportunity for you!

Dan Loichinger | Facilitator & Coach | dan@loichingeradvantage.com

Brad Simonson | CFO Member | brad.simonson@jaeckledistributors.com

Marla Frank | CFO Member | mmfrank@frankproductions.com

Jeff Audretsch | Senior Director Member | jaudretsch@belllabs.com