



FROM THE

PRESIDENT



MARCH 2023

The Dallas Chapter of FEI feels like it's back in full swing as attendance continues to increase at our events, and our social networking calendar gets busy. The Northwood Club ballroom felt back to normal at the February monthly meeting with great attendance at both the Professional Development Session and the Dinner Program. The Annual Accounting and Tax Update led by KPMG once again hit on the major technical topics facing financial executives. Partner Michael Nesta, Senior Manager Becca Thompson, and Principal Peter Baltmanis all did an outstanding job of leading the presentation.

The Dinner Program panel moderated by Renee Arrington of Pearson Partners with panelists Chandra McCormack, Advisory Board Member with OptimEyes.AI; Tracey Doi, former CFO of Toyota North America; and Gina Norris, Board Member with Encore Wire Corp., Texas Security Bankshares, and The State Fair of Texas; gave us insight into the journey of making the transition from being a CFO to working on Corporate Boards.

February also brought us our first major social networking event of the year, the annual Winter Social. Our All Hat, No Cattle party was spectacular and the feedback from members has been outstanding. What an event! The venue, the attire, the food, the refreshments, the music, and the dancing were all amazing and fun. A huge thanks goes out to the entire group who put it all together: Bob Walker and Mark Dendle (Chair and Vice Chair, respectively of the Special Events (Social) Committee); Kristine Powers, Erik Cooper, and Patrick Tam (Winter Social Planning Committee); Warren Rapert (Sponsorship); Jackie Dunn (Manager and Sponsorship); and Emily Colgan (Administration) did a wonderful job. A heartfelt thanks to Winter Social Planning Chair Kristine Powers for her incredible contributions to make this event a roaring success. A special thanks also goes to our sponsors for the event: EPIC Insurance Brokers and Consultants (Title Sponsor); Holmes Murphy (Special Events Partner); Fifth Third Bank (Entertainment Corral); Sewell (Valet Sponsor); and Devils River Whiskey (Spirits Sponsor).

Our spring schedule for FEI Dallas is loaded with CPE and social networking events. Check our Monday events emails, mark your calendars, and save the dates. Registration is either open or will be open soon for upcoming events!

Our annual Wine Tasting is March 30 at the Dallas Arboretum with some great wines and fun activities playing off The Price is Right game show. This will be followed by the Golf Tournament on May 8, once again at Cowboys Golf Club in Grapevine. Sponsorships are available for both events; contact Warren Rapert (warren@jcaseyassociates.com) and Jackie Dunn (jackie.dunn@feidallas.org) for details. Great events and great venues! I hope to see you there.

The next monthly meeting is April 10 at Northwood Club. We are honored to host students from the University of North Texas, The University of Texas at Dallas, University of Dallas, Paul Quinn College, and Texas Woman's University who participated in the FEI Dallas Financial Executive Experience, along with their FEI Dallas executive mentors and university coordinators and faculty. Stay tuned for more information and sign up when registration opens!



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The CFO series of Special Interest Groups has had some great events this winter and spring. Watch for their emails and register. FEI Dallas SIGs include: Manufacturing/Distribution, Energy, Technology, Real Estate, Retail/Restaurant, Healthcare, and Private Equity. SIG meetings are open to FEI members, and non-members with financial or executive roles in their respective industry.

Welcome to Spring 2022! Get engaged! Register for these upcoming events! Don't meet me there, beat me there!

Jay Smith

Southwest Regional Director – Finance and Accounting/Data Analytics

Jefferson Wells

FEI Dallas President 2022-23