

August 1, 2016

Dear Members and Friends of FMS Boston,

Thank you for making the Financial Managers Society (FMS) Boston Chapter a continued success. Membership in the Boston Chapter of FMS allows us to provide educational and networking opportunities to Presidents, Chief Executive Officers, Chief Financial Officers, Controllers and Investment Officers and other professionals from both banks and credit unions. Our affiliate members include professionals from Investment, ALCO, Consulting, and Accounting firms, which allow us to have top rated speakers present at the monthly meetings.

We are excited to kick off our 2016/2017 year! Highlights of our program include:

* **East Coast Regional Conference** – September 18th – 20th, 2016 – Boston Marriott Long Wharf. This world class event is a must-attend for financial professionals. The FMS East Coast Regional Conference is an exciting opportunity to obtain the latest industry information, network with your peers and earn up to 11 CPEs. This will be an unparalleled opportunity for professional development in the beautiful Boston Marriott Long Wharf hotel in the heart of Boston Harbor. Online registration is open online now at [fmsboston.org](http://fmsboston.org).
* **The Finance & Accounting Conference** – October 18th, 2016 – Courtyard Marriott in Marlborough. The FMS Boston Chapter will once again join with Massachusetts Bankers Association and offer a full day conference. The agenda includes a full day’s worth of exciting and current topics relevant to both banks and credit unions, including, but not limited to, an accounting and tax update, an economic update, interest rate risk, investment portfolio performance, bank regulatory panel update, and more. Earn up to 7 CPEs.
* **Membership Drive** – The FMS Boston Chapter is one of the largest and most active chapters. An active and growing membership are the keys to our chapter’s success! We are asking all current members to help grow our membership by referring a colleague or friend to FMS Boston. **For every new member referred by you before December 2016, you will entered into our drawing to win $200!!** Don’t forget to ask each new member you have introduced to FMS to indicate in their applications that they were referred by you!
* **Community Commitment** – Our November monthly meeting will be dedicated to Toys for Tots. In the spirit of the holiday season, bring an unwrapped gift to our November meeting to be donated to a child in need!
* **Bring a Guest** – January will be “Bring a Guest” month. Introduce a colleague or friend to FMS Boston. Bring a non-member to our January monthly meeting for the Member price. We hope to welcome many new faces in January!
* **We are listening!** – We received over 100 responses to our recent survey. We will be posting the results on our website shortly – <http://www.fmsboston.org>. The survey results indicated that the vast majority of you are happy with the location and time of our meetings, and therefore, we will continue to hold our monthly meetings at the Embassy Suites, Waltham, MA and the Hartford/Windsor Marriott Airport, Windsor, CT. Our Western Massachusetts/Connecticut meetings are presented with great support from the Connecticut Bankers Association. You provided great feedback relating to our meeting topics and speakers – we will be building on our past successes and trying new ideas. Thank you for sharing your opinions with us!
* **Mini-sessions** – Based on your survey feedback, we learned that you want more learning opportunities on varied topics. Borrowing an idea from our friends at FMS Philadelphia, we will be introducing “mini-sessions” – short sessions, covering new and different topics, starting just prior to our cocktail hour, at no additional cost to you. Many of these sessions will also qualify for CPE. Come early and beat the evening traffic! Sessions will begin at 4:00 PM in Waltham – see our schedule for more information.
* **Group Membership Discounts** – In order to provide an opportunity for more individuals from each of your organizations to join FMS Boston, we are implementing group membership discounts. The more members from each of your organizations, the greater the savings to you. More information about our membership dues for groups is below.

The following is our 2016-2017 schedule; please mark your calendars to reserve these dates, as we are finalizing speakers for all of these educational opportunities.

|  |  |  |  |
| --- | --- | --- | --- |
| **Date** | **Program** | **Location** | **Available CPEs** |
| September 18th-20th, 2016 | East Coast Regional Conference\**Register online now at fmsboston.org* | Marriott Long WharfBoston, MA | **11** |
| October 12th , 2016  | Investments Update | Hartford/Windsor MarriottWindsor, CT | **1** |
| October 18th, 2016  | Finance and Accounting Conference | Courtyard MarriottMarlborough, MA | **7** |
| November 29th, 2016  | Economic Update – *Toys for Tots* | Embassy SuitesWaltham, MA | **1** |
| December 1st, 2016  | Balance Sheet Strategies/Economy | Hartford/Windsor MarriottWindsor, CT | **1** |
| January 31st , 2017 | Real Estate Update – *“Bring a Friend”* | Embassy SuitesWaltham, MA | **1** |
| February 8th, 2017 | Accounting Update (including CECL) | Hartford/Windsor MarriottWindsor, CT | **1** |
| February 28th, 2017  | Investments | Embassy SuitesWaltham, MA | **1** |
| March 28th, 2017  | Accounting Update (including CECL) | Embassy SuitesWaltham, MA | **1** |
| April 4th, 2017 | ALCO Update | Hartford/Windsor MarriottWindsor, CT | **1** |
| April 25th, 2017  | ALCO – *Past Presidents’ Night* | Embassy SuitesWaltham, MA | **1** |
| TBD | 25th Annual Golf Tournament | TBD |  |

Membership dues go beyond just education and networking – they support chapter operations, the website, mailings, a scholarship, as well as charitable donations.  Please consider supporting your local chapter of the Financial Managers Society by joining today!

Members’ benefits include:

* $100 off registration for our upcoming East Coast Regional Conference in Boston
* $150 off registration for our Finance and Accounting Conference, sponsored jointly by FMS and Mass Bankers Association
* $15 off registration for each of our monthly dinner meetings
* $35 off registration for our FMS Golf Tournament
* Eligibility for a child or grandchild to apply for our college scholarship

Annual Individual Membership dues for the 2016/2017 season are as follows:

Bank and Credit Union Individual Membership $100.00 per member

Non-Financial Institution Membership $125.00 per member

Annual Group Membership dues for the2016/2017 season are as follows:

 3 individuals Save 15%

 Up to 5 individuals Save 20%

 Up to 7 individuals Save 25%

 Up to 10 individuals Save 35%

**For an Individual Membership,** join or renew your membership now online*!*

***Current members*** - To renew or update your membership, log in to your profile at <http://www.fmsboston.org/> with your email and password and follow suggested actions on your profile screen.

***New members*** – To join, please go the [Join Us](http://www.fmsboston.org/join-us) page of our website, select the appropriate membership level and follow the directions from there.

**For Group Memberships,** print a [Group Registration Form](http://www.fmsboston.org/resources/Documents/2016_2017/FMS%20Group%20Membership%20Form%202016-2017.docx) and scan or mail to us following the instructions on the form.

**Credit cards are accepted for all transactions online!**

Monthly Meeting rates for the 2016/2017 season are as follows:

Boston Chapter Member $70.00 per member

Non-Member $85.00 per non-member

Please note that in the event of late registration, a $5.00 fee will be added.

Non-members are always welcome to attend any of the regular Boston meetings at the guest rate.  The website, <http://www.fmsboston.org>, is a good resource to learn how to register for upcoming meetings.

Thank you for your support and we look forward to seeing you at the meetings!

Very truly yours,

Officers:

Linda Stahl, Paladin fs – President

Julie Houle, RSM US LLP – Vice President

Susan Hannigan, Jeanne D’Arc Credit Union – Treasurer

Jay Stephens, Lowell Five Cents Savings Bank – Secretary

With great support from:

Leo Sagan, Westfield Bank – Western, MA / CT

Brian Canina, PeoplesBank of Holyoke – Western MA / CT

Denise Carbone, The Savings Bank – Past President

Erik Porter, Metro Credit Union – Past President

Bob Bogart, Georgia United Credit Union – Past President

Jerry Gagne, Wolf and Company – Past President

Steve McHugh, FHLB Boston – Past President

About FMS Boston Chapter: The Financial Managers Society was founded in 1951. The chapter primarily serves members in Massachusetts, Maine, New Hampshire, Rhode Island, Connecticut and Vermont. Currently, the Boston Chapter has over 250 members.  The success of the Boston Chapter is directly correlated to the dedication of the many bank and credit union professionals who have served over the years and are now part of alumni group.  We are committed to providing an environment for peer networking and offering a program of quality educational topics addressing the many challenges currently facing financial institutions.  These programs also meet NASBA requirements providing our CPA members affordable CPE credits.