



August 8, 2017

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 all of our monthly meetings and other forums.

We are excited to kick off our 2017/2018 year! Highlights of our program include:

- **East Coast Regional Conference** – September 17<sup>th</sup> – 19<sup>th</sup>, 2017 – Hyatt Regency, Bethesda. It's a Monumental Conference in Bethesda, just outside of Washington DC. The Maryland Chapter of FMS will be hosting the East Coast Regional Conference, this year. Enjoy the history and beauty of the Washington area as you network with your peers and attend relevant, engaging workshops presented by respected speakers on finance, accounting, asset and liability management, liquidity management, and much more. This world class event is a must-attend for financial professionals. [Click here](#) to take you to the **East Coast Regional Homepage** where you can learn about the agenda and program. Don't forget to book your room at the Hyatt Regency in Bethesda using group rate to get your discounted rate of \$239 plus taxes. [Click here](#) to book your room. For an extended stay please call the hotel (301-657-1234) directly!
- **The Finance & Accounting Conference** – October 18<sup>th</sup>, 2017 – 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, derivatives and hedging, BOLI/COLI update, a regulatory update, cybersecurity and succession planning, and more. Earn up to 6 CPEs.
- **Emerging Leaders Session** - New this season, we will be asking all of our members to invite a young colleague, mentee, or other individual you see as an emerging leader in the industry. Leesa Schipani of Kardaslarson will be hosting our session in November and leading a discussion and workshop on "building networks" and why it is critical skill of a successful leader. Following that session, Emerging Leaders will be invited join us in networking, dinner, and our evening monthly meeting. We hope to see many new faces in November!
- **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 2017, 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** – Following the success of last year's Toy Drive, 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 again 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!
- **Mini-sessions** – We will continue "mini-sessions" this year – 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 continuing with 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 2017-2018 schedule; please mark your calendars to reserve these dates, as we are finalizing speakers for all of these educational opportunities.

<b>Date</b>	<b>Program</b>	<b>Location</b>	<b>Available CPEs</b>
September 17-19, 2017	East Coast Regional Conference <i>*Register online now at <a href="http://fmsmdchapter.org">fmsmdchapter.org</a></i>	Hyatt Regency Bethesda, MD	<b>10</b>
September 26, 2017	Strategic Planning	Embassy Suites Waltham, MA	<b>1</b>
October 18, 2017	Finance and Accounting Conference	Courtyard Marriott Marlborough, MA	<b>6</b>
October 26, 2017	TBD	Hartford/Windsor Marriott Windsor, CT	<b>1</b>
November 28, 2017	Economic Update – <i>Toys for Tots</i> Emerging Leaders Session	Embassy Suites Waltham, MA	<b>3</b>
December 13, 2017	TBD	Hartford/Windsor Marriott Windsor, CT	<b>1</b>
January 23, 2018	Real Estate Update – <i>Bring a Friend</i> Mini-Session – The New Leasing Standard	Embassy Suites Waltham, MA	<b>2</b>
February 7, 2018	TBD	Hartford/Windsor Marriott Windsor, CT	<b>1</b>

February 27, 2018	Balance Sheet Strategies	Embassy Suites Waltham, MA	<b>1</b>
March 20, 2018	Accounting Update (including CECL)	Embassy Suites Waltham, MA	<b>1</b>
April 5, 2018	Jim Clarke	Hartford/Windsor Marriott Windsor, CT	<b>1</b>
April 24, 2018	Technology Update – <i>Past Presidents’ Night</i>	Embassy Suites Waltham, MA	<b>1</b>
TBD	26 <sup>th</sup> 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 Bethesda
- \$150 off registration for our Finance and Accounting Conference, sponsored jointly by FMS and Mass Bankers Association
- \$75 deduction towards annual FMS National Membership dues
- \$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 2017/2018 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 the 2017/2018 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](#) page of our website, select the appropriate membership level and follow the directions from there.

**For Group Memberships**, print a [Group Registration Form](#) 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 2017/2018 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:

Julie Houle, RSM US LLP – President  
Susan Hannigan, Jeanne D’Arc Credit Union – Vice President  
Jay Stephens, Lowell Five Cent Savings Bank – Treasurer  
Karl Brorson, Performance Trust – Secretary

With great support from:

Leo Sagan, Westfield Bank – Western, MA / CT  
Brian Canina, PeoplesBank of Holyoke – Western MA / CT  
Linda Stahl, Paladin fs – Past President  
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.