

FMS Philadelphia Chronicles

Special Edition No. 1

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FMS National Finance & Accounting Forum

BY: JOHN CARROZZA AND CHRISTINE FUNKHOUSER

FMS National held its 2014 Finance & Accounting Forum for Financial Institutions in Orlando, Fla. on June 22-24. The forum didn't fall short on great sessions and networking opportunities. This year's forum brought much excitement for the Philadelphia Chapter.

With the support of the FHLBank of Pittsburgh, the chapter honored Bill Kline with a champagne and dessert reception on Sunday night for his past year of service as FMS National Chairman. Bill has been a big supporter of the Philadelphia Chapter and we were proud to have him represent us in his role as chairman.

The Philadelphia Chapter hosted its first official chapter dinner at Fulton's Crab House in Downtown Disney on the Monday night of the conference. It was quickly decided that chapter dinners become an annual tradition and we hope to see everyone in Scottsdale, Ariz. next year June 14-16, 2015.

The conference wrapped up on Tuesday when Chapter President John Carrozza proudly accepted the Chapter Excellence and Chapter Growth Awards from Bill Kline for 2013-2014 year.

Annual FMS and IFI Golf Outing

BY: CHRISTINE FUNKHOUSER



PHOTO COURTESY OF DAN MCKEAN

On Monday, August 4 the FMS Philadelphia Chapter, partnered with IFI, held its annual golf outing sponsored by Global Tax Management, Inc. The outing returned to Overbrook Golf Club this year after a successful year at North Hills Country Club.

The morning teed off with a session featuring Congressman Jim Gerlack, House Ways and Means Committee; Guy LeBas, Janney Capital Markets; and Q&A and comments from Peter Knight of FHLBank of Pittsburgh. John Foff did a great job arranging an excellent group of speakers.

Approximately one hundred golfers including Tom Harbaugh, John Douglass, Linda Roehner, Rob Galbreath and Graig Fisher (pictured above) spent the afternoon with chapter friends enjoying a round of golf followed by dinner in the club house.

FMS would like to extend a special thanks to the many sponsors that made this event possible. If you missed the event start practicing your swing as FMS/IFI golfing returns August 10, 2015 at its new location, Doylestown Country Club.



PHOTO COURTESY OF CHRISTINE FUNKHOUSER

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From the Editor...

BY CHRISTINE FUNKHOUSER

It seems like the installation dinner was just yesterday, yet here we are about to kick off the 2014-2015 FMS year with our first dinner meeting. As you can see, this summer has been a busy one for the Chapter. Too often we move from event to event and lose sight of all the great things the Chapter has done. I hope you enjoy reading this

Newsletter as much as I did pulling it together.

When I spoke in May I was excited about bringing some new events to the membership while also keeping with Chapter traditions. I hope everyone takes full advantage of what the FMS has to offer and finds someone to mentor into the organization this year!

Take Me Out to the Ball Game!

BY ANNA BOGIATZIS AND CHRISTINE FUNKHOUSER

Hot Dogs, Peanuts, Cracker Jacks and great company were on the menu on Sunday, July 27th at Citizens Bank Park when the Chapter welcomed FMS members and their families to its first Phillies Game "Give Back" event.

Ninety minutes prior to game time, members gathered at the High and Inside Pub where all age groups enjoyed traditional ballpark fare. Great conversation and laughter filled the room as the crowd was anxious to fill the reserved FMS section of Citizens Bank Park.

Beautiful warm, sunny weather and a Phillies 4-2 win against the Arizona Diamondbacks summed it up to a perfect day.

Pictured below are Eric Golden with Isabella (age 5) and Luke (age 3).



PHOTO COURTESY OF ANNA BOGIATZIS

Possibly the Sweetest Conference on Earth!

BY CHRISTINE FUNKHOUSER AND LINDSAY KERSHNER

Four years ago the ECR Conference was held at the Four Seasons Hotel in Philadelphia. After traveling to Newport, R.I., New Haven, N.H. and Annapolis, Md., the Philadelphia Planning Committee, led by Pat Mulloy, chose The Hershey Hotel as the next location for the 2014 ECR Conference held on September 28-30.

Conference attendees and their families enjoyed the many amenities the resort has to offer including golf, tours of the Hershey Gardens, and the famous Hershey Spa to name a few. A nice bonus for attendees and their families was the free Hershey Park tickets provided courtesy of the Philadelphia Chapter with early admission to the Park.

The conference program fea-

tured 13 dynamic CPE sessions led off by Key Note Speaker Bob Kafarian providing his insight on developing and mentoring the next generation of bankers.

Title sponsors the FHLBank of Pittsburgh and McGladrey hosted a Sunday night welcome dessert reception and a Monday night networking dinner featuring animals from Zoo America, Hershey characters and a photo booth.

"I loved Hershey" was written on one of the anonymous evaluations forms. The conference was a big success for the Philadelphia Chapter due in large part to the planning committee and the generous support of the Chapter's many sponsors. Hershey provided a welcomed resort atmosphere to the conference's 170 attendees.



PHOTO COURTESY OF CHRISTINE FUNKHOUSER

Membership and Mentorship

BY CHRISTINE FUNKHOUSER

Membership is an important chapter goal every year. Strategies to increase membership are discussed at every board meeting and by every new president. When you think back to how you became involved with FMS, you were most likely introduced by a current member. Perhaps someone at your institution suggested joining or you were told it's a great way to network with your banking client base.

This year, members will be encouraged to share their FMS stories at our dinner meetings. The future of the Philadelphia Chapter depends on mentorship. The Officers and Board of Directors challenge every member to identify someone, within your organization or a friend in banking, to attend a few meetings this year and find out what FMS is all about. There couldn't be a better time to join than now. The FMS year is just starting!

Mark Your Calendar!

Wednesday, October 15th:

The Philadelphia Chapter of the Financial Managers Society along with BDO USA, LLP will host a "Rising Stars Panel" at 3:30 pm at the Radnor Hotel before the dinner meeting. This event is a big part of the Chapter's efforts to reach out to younger financial professionals and expand the membership base. The panel will focus on Controllers, Treasurers, and other financial professionals in the Banking Industry that could someday be the CFO's of our institutions. The following dinner will recap and expand on panel discussions.

*Tuesday, October 28th:

The Philadelphia Chapter is proud to host its first Women's Networking Event focused on women in banking partnered with Global Tax Management, Inc. Guest Speaker Jeane Coyle, President and CEO of First Federal of Bucks County, will speak about navigating a career in banking at the Llanerch Country Club.



Wednesday, November 12th:

The Philadelphia Chapter of the Financial Managers Society will host its annual CFO Roundtable sponsored by McGladrey at 3:30 pm at the Radnor Hotel before the dinner meeting. Panelist of Participants will review significant banking issues, concerns and trends as we enter 2015, with continuing commentary at the dinner.

*Friday, November 21st:

FMS Philadelphia is excited to offer its first complimentary CPE breakfast session hosted by Interphase Systems, G2Link and Integress from 8:00 -11:30 am at Penn State Great Valley Conference Center. There will be a panel discussion on the Next Gen Approach to technology in regional banking. A team of experts in the technology field will lead you in a discussion of where they see technology in banking and how to quickly and efficiently leverage the opportunity in technology to enhance profit and reduce risk.

Tuesday, December 9th:

FMS Philadelphia celebrates 25 years at the Four Seasons Hotel Philadelphia for the annual Holiday Dinner with guest speaker Merrill Reese, play-by-play radio announcer and voice of the Philadelphia Eagles. Please bring a toy to benefit the Toys for Tots Foundation.



*** New event for this year**

Please visit <http://www.fmsphila.com/index.php/events> for more details