

CFE Newsletter
April 2010

Member News

Kelly Grier has been honored by the World Economic Forum as a Young Global Leader for 2010. "A visionary leader with the potential to transform society" is how Ernst & Young Chicago office Managing Partner Kelly Grier was described when nominated for this year's prestigious list of World Economic Forum (WEF) Young Global Leaders. Her selection means Kelly will represent Ernst & Young at the highest levels, at major events like the WEF Annual Meeting in Davos and by working with other Young Global Leaders to find solutions to today's most pressing problems. She joins just 196 other 2010 honorees from 72 countries across an array of sectors who will serve for the next five years. Chaired by Queen Rania of Jordan, the selection committee chose Kelly from almost 5,000 candidates, all aged under 40. Other 2010 honorees include YouTube co-founder Steven Chen and Twitter CEO Evan Williams, as well as tennis star Roger Federer and musician Wyclef Jean.

Kate Bensen has been appointed the Executive Director of The Chicago Network, effective April 19th. The Network's more than 400 members (several of whom are also CFE members) are the leading women of Chicago's business, professional, cultural, nonprofit and educational communities.

Anne Hamblin Schiave retired from Holland & Knight, LLP effective March 31, 2010, after more than three decades of practicing law. Anne is exploring alternatives, but has no definite plans.

Cindy Baier would like to inform the CFE membership that she just completed the transition of Movie Gallery's offices to Wilsonville, Oregon. Movie Gallery was a \$2 billion movie rental and entertainment retailer. Given Cindy's desire to live in Chicago, she is exploring public and private CFO opportunities in the Chicago market. During her transition, she is enjoying spending more time with her husband Dave, reconnecting with old friends and developing new relationships. Cindy appreciates everyone's support during her transition.

Kathy Preston's daughter, Amy, will be graduating from Dominican University with an honors degree in graphic design in early May. With the job market tight, Kathy welcomes any leads about open graphic design positions.

Anna Rappaport gave two presentations — one on the New Retirement and one on the Implications of Longer Life Spans at the Inter-company Long Term Care Conference in March. Anna is giving a presentation on The New Retirement: Phased Retirement and Phases of Retirement at the Financial Planning Association's retreat in April and she will also be presenting at the Investment Company Institute's general membership meeting in May. And, Anna is now writing a column for the Society of Actuaries Pension Section News, providing her perspectives on important topics related to retirement security.

Cathy Jaros serves on the program committee for the woman's group of the Turnaround Management Association. Cathy says "We are having a lunch and speaker on Tuesday, May 25. All CFE members are invited. Marilyn Moats Kennedy, a noted author and the former workplace editor for *Glamour* magazine, will be addressing issues women still face in today's business environment. She is a terrific speaker and it should be an informative and fun event. The luncheon takes place at the East Bank Club from 11:30am - 1:30pm. Stay tuned for more information in our next newsletter."

Committee News

Member-To-Member

SECOND ANNUAL NEIGHBORHOOD DINNERS
THURSDAY, APRIL 29, 2010
6:30 PM

The Member-To-Member committee is pleased to be sponsoring the neighborhood dinners again this year. This popular event provides a forum for small groups who live and/or work in the same area to gather, socialize and discuss topics of interest. Deadline for registration is April 5! Contact the CFE office (312-263-1588 or chgoфинex@aol.com) if you need a copy of the registration form.

Networking Committee

Are you interested in meeting more CFE members? Have you been thinking about getting more involved with CFE, but concerned that you don't have the time? Why not join the networking committee! We are looking for CFE members to be table hosts during our dinner meetings. As a host you will help to facilitate brief introductions to make sure that every one at the table has an opportunity to meet each other. This is a wonderful opportunity for you to meet new people, as well as to welcome new members and guests to CFE. If you are interested please contact Ellen Rogin, erogin@sfd-inc.com or 847-441-8700.

Philanthropy Committee

The first order of business is to thank all Philanthropy Committee members who participated in The Enterprising Kitchen financial literacy sessions during the past year. Janice Lucchesi presented the last session in January covering tax preparation. Twelve TEK employees participated and were thankful to receive this helpful information.

Historically, the CFE Philanthropy Committee delivered the five-part financial literacy program twice a year. However, after discussion with the TEK Executive Director, it was determined it would be best to align the program schedule with the start date of new TEK employees. TEK just started a new group of employees this past month. Therefore, the 2010 dates are scheduled. See below.

A number of CFE Philanthropy Committee members have already generously volunteered to lead each of the sessions. We now need volunteers to accompany the presenter and to join the discussion and provide their personal insights. The sessions begin at 9am and last about an hour. TEK is located near Ravenswood and Montrose.

First session was held Thursday, January 21 on Tax Preparation with Janice Lucchesi as presenter.

Upcoming sessions include:

Thursday, April 8 on Financial Goals and Budgeting with Ellen Rogin

Thursday, May 27 on Stretching Your Resources and Avoiding Money Traps with Lisa Leonard

Thursday, July 15 on Investment Options with Mary Cahillane

Thursday, September 9 on Introduction to First Time Home Buyers with Jo Jackson

The committee is always seeking more volunteers to participate in delivering the financial literacy sessions. If you are interested in getting involved, your responsibilities as a first-time volunteer will be limited to joining in the dialogue with the presenter and TEK employees. A new volunteer can step into the role of lead presenter whenever she feels ready. The financial topics covered are very simple and no advance work is required.

Please contact committee chairs Karen Wuertz (kwuertz@nfa.futures.org) or Debbi Gillespie (djgillespie@joycefdn.org) if you would like to participate in the Philanthropy Committee activities.

Membership

Are you interested in proposing a new member? The Membership Committee, co-chaired by Michelle Moreno and Lynn McHugh reminds members that eligibility requirements for prospective members are posted on the CFE web site at www.chicagofinanceexchange.org.

The committee also reminds members that all new member candidates must be pre-qualified before the nomination process can begin. To assist members and the committee in pre-qualifying candidates, the committee has created a new member questionnaire form. Members looking to pre-qualify candidates are asked to complete this form and submit it to the CFE office or a member of the committee for pre-qualification. Contact the CFE office (chgofinex@aol.com or 312-263-1588) if you need a copy of the form.

The Committee remains focused on the senior-most professional women in Chicago area organizations and encourages every member to consider possible candidates. CFE seeks candidates that bring deep knowledge, experience and expertise to the group. Remember to pre-qualify all potential candidates. Committee members include: Michelle Moreno, co-chair (mmoreno@firstanalysis.com), Lynn McHugh, co-chair (llmchugh@gmail.com), Donna Moore (dmoore@chicagopublicradio.org), Chris Rashid (crashid@lotosgroupe.com), Dorri McWhorter (dorri.mcwhorter@crowehorwath.com) and Lori Carlson (lori.carlson@hospira.com)

CFE on LinkedIn

The Chicago Finance Exchange now has a members-only group on LinkedIn. We post open positions and host discussions on the site. If you already have a LinkedIn profile, just search on Groups for "Chicago Finance Exchange" and click on "Join this group." We hope you join us!

Programs

"Save the Date" for CFE's next dinner meeting - Thursday, May 13, 5:30pm, location TBA. Anne Phelps, Partner, Washington Council & Health Care expert from Ernst & Young will be our speaker. Details will be sent to members in the next few weeks.

Did you know that CFE has a calendar of events listed on the members only side of our web site, www.chicagofinanceexchange.org? This calendar lists Dinner Meetings, Member-To-Member meetings, Board and Committee meetings and other events hosted by CFE. And, if you click on the calendar date of a particular meeting, additional information about that event will appear.

Lunch-N-Learn

The CFE Lunch-N-Learn Committee hosts luncheon meetings featuring the expertise of our members. The objectives of the group are to provide a forum to facilitate:

Members sharing knowledge and expertise;
Enhanced business networking; and
Understanding what our members do professionally.

These meetings are open to CFE members only. We invite you to attend our next luncheon...

Chicago Finance Exchange Lunch-N-Learn
Annual Capital Markets Update & Discussion
Led by:

Venita Fields, Partner, Smith Wilely & Company
and
Christine Kelly, Principal, William Blair & Company

Thursday, April 8th
12:00noon - 1:15pm

Location: Bernstein Global Wealth Management 227 W. Monroe Street, 59th Floor, Chicago
Hosted by: Leslie Grant, Bernstein Global Wealth Management
A light lunch will be served
Photo ID and advance reservations are required!

Please RSVP to leslie.grant@bernstein.com by Tuesday, April 6

Career Networking Committee

The Career subcommittee of the CFE Networking Committee is planning a luncheon event on June 8th at noon at MetCap Bank titled "For Profit to Non-Profit: It's More - and Less - Different Than You Think." Gaye van den Hombergh and Mary Lee Montague will speak about transitioning from the corporate world to the non-profit world. For now, please "save the date." Details will be sent to members in the next few weeks.

Money Smart Week

CFE cosponsors the Money Smart Week Preview Celebration and our members are invited to attend the event at no cost. CFE member, Melody Hobson, participates on the panel discussion for this event. We hope you can attend! Event and RSVP details are below and space is limited.

Be Our Guest! Money Smart Week Preview Celebration
Friday, April 16, 2010
5:00 - 7:30pm

THE CHICAGO BOARD OPTIONS EXCHANGE
400 S. LaSalle Street, Chicago, Illinois

SPACE IS LIMITED
RSVP "ASAP" to Laura Johnson
312-786-7818
JohnsonL@CBOE.com

WELCOME REMARKS

William J. Brodsky: CBOE, CEO and Chairman
Kay H. Kamin: TCW Financial Columnist
2010 Money Smart Kid

PANEL DISCUSSION

What are the Lessons of the Past Three Years and How Should We Apply Them?

With

Jack Ablin — Chief Investment Officer, Harris Private Bank and author of Reading Minds and Markets
Melody Hobson — President of Ariel Investments, and financial contributor to ABC's Good Morning America
Gail Marks Jarvis - Financial Columnist, Chicago Tribune

Jon Najarian - optionMONSTER co-founder, CNBC TV Contributor
Moderator - Eric T. McKissack - President, CEO and Chief Investment Officer of Channing Capital Management, LLC

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