

2019

# CHAPTER

IN A

BOX

FINANCIAL MANAGERS SOCIETY

The Chapter-in-a-Box provides the resources necessary to develop, launch, grow and sustain an FMS chapter. These materials and documents include suggestions for building membership, membership retention, programming, collaboration with National, and more. If you are interested in developing a new FMS Chapter please reach out to [FMSchapter@fmsinc.org](mailto:FMSchapter@fmsinc.org).

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# FMS CHAPTER GOALS

FMS Chapters are developed to provide local networking and professional development opportunities to finance professionals at banks, credit unions, and thrifts.

Chapters are expected:

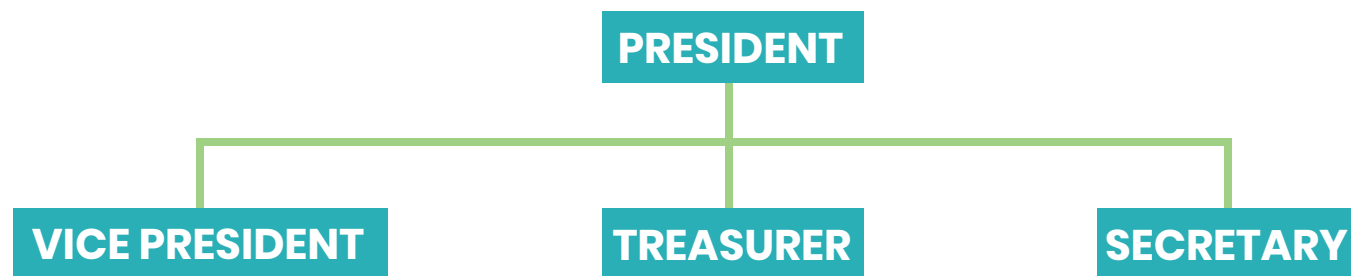
- 1** To provide a **FORUM** for the sharing of experiences and expertise among financial, operational, risk management, and other personnel employed by financial institutions and supportive organizations.
- 2** To **ENHANCE** the professional and personal development of financial, operational, risk management, and other personnel employed by financial institutions and supportive organizations.
- 3** To **STUDY** operations, financial management, financial reporting, systems, procedures, accounting, risk management, internal auditing, or data processing techniques used by financial institutions and to devise ways and means of improving the same.
- 4** To **PROMOTE** high standards of practice in operations, systems, procedures, financial management and reporting, accounting, internal auditing, risk management or data processing.
- 5** To **PROMOTE** FMS activities on both a local and a national level and to encourage national involvement of chapter members whenever possible.

# BYLAWS

All FMS chapters are required to adhere to the FMS Professional Chapter Bylaws.  
*Please see Appendix page 27.*

# RESPONSIBILITIES OF CHAPTER OFFICERS

Each chapter is required to have a: President, Vice President, Treasurer, and Secretary. FMS National membership is required for each officer.



Chapters officers are the driving force of each chapter and are expected to provide leadership to meet the needs of chapter members and industry professionals in their local community. Officers are tasked with planning and promoting activities in alignment with the goals of the organization.

FMS chapters also maintain a responsibility to the National organization. Chapters are expected to maintain open communication with National, provide updates in officers and contact information, and submit chapter member rosters.

*Additional information on general responsibilities for the President, Vice President, Treasurer, and Secretary can be found on Appendix page 35.*

# FMS CHAPTER AND CHAPTER MEMBER BENEFITS

Chapters and chapter officers can access benefits provided by FMS National. These benefits cover some of the operational procedures, administrative efficiencies, and offer support for event, recruitment, and retention marketing. FMS offers each chapter access to:



**CHAPTER WEBSITE** – FMS National offers each chapter a website with hosting, an exclusive member discussion forum, contact reference page, and additional add-ons as needed such as a blog or photo gallery. FMS National can also facilitate and support online payment processing.



**CHAPTER D&O INSURANCE** – FMS contracts and provides Director & Officer, as well as Liability Insurance for each chapter.



**UPCOMING EVENTS CALENDAR** – Share upcoming events with FMS members, non-members, and all chapter members at: [FMSinc.org/ChapterEvents](https://fmsinc.org/ChapterEvents)



**MARKETING** – FMS National can provide additional event promotion through email marketing to a network of over 8,000 contacts. Chapter messaging can be sent to contacts who are members and non-members within a radius of up to 250 miles of the event location.



**CHAPTER DUES DEDUCTION** – Chapter members are eligible to deduct their chapter dues from the national membership rate up to \$75.

## CHAPTER WEB TOOLS

FMS now provides chapters the opportunity to have their website hosted by the National organization. The sites share important information such as the mission statement, leadership and member directory, upcoming events, and other pages unique to each chapter.

Visit [FMS-Wisc.org](https://www.fms-wisc.org) to view the FMS Wisconsin Chapter website, which is hosted by National. While the website is created and largely maintained by FMS staff, training and a user guide provided to the chapter for reference. Any updates needing to be made that the chapter cannot complete can be sent to FMS national staff.

Chapter websites include a member only discussion forum that allows members to engage and connect outside of in-person events. Site administrators can create communities for chapter leaders, committees, and specific industry topics.

During the website development, FMS National can create branded social media pages for Twitter and LinkedIn that are also connected to the webpage. Social media is a great tool to promote programs, share information about the chapter, and recruit new members from a wider audience.

## BEST PRACTICES



Using communities in the discussion form can be a great benefit, especially to Chapter officers! Create a private community exclusively for chapter officers to share information, review documents, and collaborate on upcoming events.



The member forum is designed to foster ongoing networking amongst members and can also be used to identify topics and discussions that are most important to chapter members. This information can be beneficial in planning education programs and other events.

## RECRUITING MEMBERS

The most effective ways to recruit new members are word of mouth, personal contact, and industry networking. These methods begin with the Chapter Leadership Team resulting in a solid member base that continues to grow when members share their experience with friends and colleagues.

### BEST PRACTICE



The key to developing new chapters and recruiting new members is leveraging the personal connections of your own network. Reaching out via email and advancing to phone calls is a great way to promote the new chapter initiatives and garner interest.

*Example to start a chapter and cultivate a membership base –*  
Dear John,

I'm reaching out to you on behalf of the Financial Managers Society (FMS). I'm currently a member and have been working with FMS to bring their nationwide networking and education opportunities to the [insert city] area.

Creating an FMS chapter here will open a world of opportunities to industry professionals in our area. Chapter events provide education, networking, and CPE; there are also opportunities to connect with the community through outreach programs such as Habitat for Humanity, Toys for Tots, college scholarship programs and more.

Join me in bringing FMS to our backyard! If you are interested in attending an FMS event, continuing the conversation or being part of the process, please let me know. I look forward to hearing from you.

[insert closing here]

For initial sourcing and recruitment, FMS National will coordinate with local leaders to send marketing to members and non-members in the contact database promoting the opportunity to get involved locally. This marketing provides overview of a networking event, the goals of the chapter, and reiterates the partnership between FMS National and the chapter.

Leveraging the benefits of connecting with the local chapter – education, networking, CPE, updates from industry leaders, key insights, etc. – are all incentives to promote membership and boost attendance at chapter events.

Membership recruitment should include information about membership dues and member benefits. By joining the chapter, members gain access to even more of the benefits such as the member exclusive discussion forum, preferential pricing on events and programs, and leadership opportunities within the chapter.

Membership dues rates are set by the chapter officers and based on the budget. There are typically two member rates, one for regular members and another for affiliate members. Please refer to the Bylaws located on Appendix page 27 for additional explanations on member types and pricing.

# FMS NATIONAL CONTENT FOR CHAPTER ACTIVITIES

FMS offers a variety of tools to be used as resources that education programs can be built upon. The resources provided offer perspective and insights on a variety of topics affecting the industry and important to members. Chapters can develop meetings based on these topics and insights, identify speakers, or create an open forum for members to discuss and share their perspectives.



## WEBINARS

FMS webinars are available in the On Demand library. Each webinar is led by a key leader and provides up to date information on topics relevant to the industry. Topics cover news, updates, best practices, and changes in the banking industry that will affect members in a variety of job functions.



## CECL CENTRAL

A portal dedicated to all things CECL featuring links to current articles and research on FASB's Current Expected Credit Loss (CECL) standard, CECL Central is a hub for new viewpoints and a great way to learn about all things CECL.



## RESEARCH

FMS publishes proprietary research yearly that can be used to boost discussions in the member forum and referenced at chapter meetings to further engage constituents at the local level.



## FMS *forward* MAGAZINE

Published bimonthly, FMS *forward* features articles and insights from industry experts to keep you connected to relevant news from the profession.



## BLOG

The Daily Dividend is updated Monday through Friday with perspectives on industry news and research.

# CHAPTER MEETINGS

Chapter meetings bring chapter members and leaders together for education, networking, and industry news and updates. Each chapter should plan to host several meetings throughout the year, making sure to keep members engaged and cover topics that are relevant to the industry.

Successful chapter meetings are:

- Held in a **CENTRAL MEETING LOCATION**, easily accessible to members
- **CONVENIENTLY TIMED** to meet the working needs of members; dinner meetings are usually well attended. Breakfast and lunch meetings are options as well based on availability of the group.
- **RELEVANT**, with speakers and topics that important to the industry. Chapter leaders should brainstorm possible meeting topics and suggestions can be taken from members as well.
- **HELD REGULARLY** to keep momentum going and to retain the interest of members.
- Given at least **SIX WEEKS OF MARKETING** including: posted to events page of website (Chapter and National), shared on social media, and shared with National to promote via email to members and prospects.

It is important for Chapters to also have regular business, program, and community service meetings throughout the year.

# CHAPTER ACTIVITIES

In addition to regular chapter meetings, member and non-member engagement can be extended to other activities and events. Social, entertainment, and volunteer programs are a great way to connect members and other professionals to the chapter.

Pricing for chapter activities varies based on the event. Most events have two rates, one for members and another for non-members. Pricing is set by the chapter officers. Incentives for program registration can include discounted rates with a deadline, special rates for members who bring non-members, etc. Special pricing is offered at the discretion of the chapter officers.

Events can be sponsored by a local or national institution. For new chapters this is beneficial and cost effective to bring in membership prospects, connect current members, and provide the education and programming they need. Sponsorship can include providing the location, meal or refreshments, and the opportunity to select the topic and speaker at an education program.

Some activities to consider are:



**EDUCATION PROGRAMS** – Usually led by an industry expert, seminars offer a more formal setting to present research, create dialogue, and engage on a unique or pressing topic. These programs are longer than a traditional chapter meeting and can provide CPE if available. A half day or day long education meeting once or twice per year can bring out a large group.



**MIXERS/SOCIAL EVENTS** – Host an event, dinner, or dessert, party where the goal is to meet and greet. Encourage others to network and exchange thoughts and ideas. To encourage attendees to relax, these events can be hosted in less formal spaces that offer food and entertainment.



**VOLUNTEER** – FMS Chapters can show support to their local community by giving back through collaborations with organizations such as Toys for Tots, Habitat for Humanity, or connecting with students at colleges/universities in the areas. Volunteer activities provide another less formal option to network with members and peers.

*Examples of chapter activities are provided on Appendix, page 43 - 44.*

# CERTIFICATE OF INSURANCE

If a certificate of insurance is required prior to hosting an event, this can be provided by FMS. To issue the certificate of insurance please submit the following information to National:

- 1 Date of Event
- 2 Name of Event
- 3 Name and address of company who will be the certificate holder
- 4 Service the certificate holder will be providing the conference
- 5 Location of event, address included
- 6 Type of event
- 7 Number of participants
- 8 Number of volunteers
- 9 Will alcohol be available? If so, provided by who?
- 10 Contact info to send certificate (name, fac, email)



# FMS NATIONAL SUPPORT

FMS National offers and provides support to each chapter to drive membership goals and promote successful programming.



**MEMBERSHIP PROMOTION** – FMS National has a network of over 8,000 members and non-members who can receive membership marketing materials. National can collaborate with the chapters to develop recruitment and retention flyers, brochures, emails, and applications, etc. FMS also maintains a webpage publicizing all chapters with links to contact leadership and get involved locally.



**MARKETING** – If you are interested in promoting an event via National please submit the event details (title, description, time, location, cost) to [FMSchapter@fmsinc.org](mailto:FMSchapter@fmsinc.org). The event will be posted to the National events calendar and marketed via email to members and non-members within a 100 - 250 mile radius of the event location. Chapter marketing examples provided on Appendix page 50.



**CHAPTER-TO-CHAPTER** – Each chapter has come to develop unique methods and practices of planning programs, selecting education opportunities, and recruiting and retaining members. Ideally, chapter leaders will connect with one another to share information, successes, and areas of improvement to which advice can be provided. This can be done in the FMS Connect chapter officers community and through the Chapter Working Group calls and meetings held throughout the year.

# CHAPTER OUTREACH AND COMMUNICATION

Chapters should maintain regular communication with members and non-members looking to connect with the chapter. Through newsletters, upcoming events, and chapter updates these messages and touch points keep professionals consistently interested and engaged with the chapter. Chapters can take advantage of email scheduling tools, social media channels such as Twitter and LinkedIn, and phone calls to connect with the desired audience.



**EMAIL** – Chapters can use their member and prospect lists to share upcoming events, membership onboarding and renewal information, and messaging related to the business of the chapter. The chapter should maintain an up to date contact list including information such as: name, title, company, address, phone number, member type, join date, renewal date.



**SOCIAL MEDIA** – Channels such as twitter and LinkedIn are great tools to keep members connected and reach a way to reach potential members. In the creation of the chapter sites FMS can also assist in setting up individual Twitter and LinkedIn pages for each chapter. A best practice guide for social media posts can be provided.

## BEST PRACTICES



Currently FMS National promotes chapter membership across several platforms including the website, emails, FMS *forward* magazine, and at education meetings



Successful marketing and event promotion occurs four to six week prior to the event. This allows for information to be optimized via several marketing channels to reach as many people as possible and have a successful event.



# FINANCIAL RESPONSIBILITIES AND REQUIREMENTS

Each chapter is an independent legal entity, is independently incorporated, and maintains its own federal employment identification number from the Internal Revenue Service.

At the beginning of the Chapter's administrative year (i.e. at the installation of new officers), the Chapter is required to submit to the national organization a Chapter Status Report provided by FMS with appropriate attachments. The report will consist of the following:

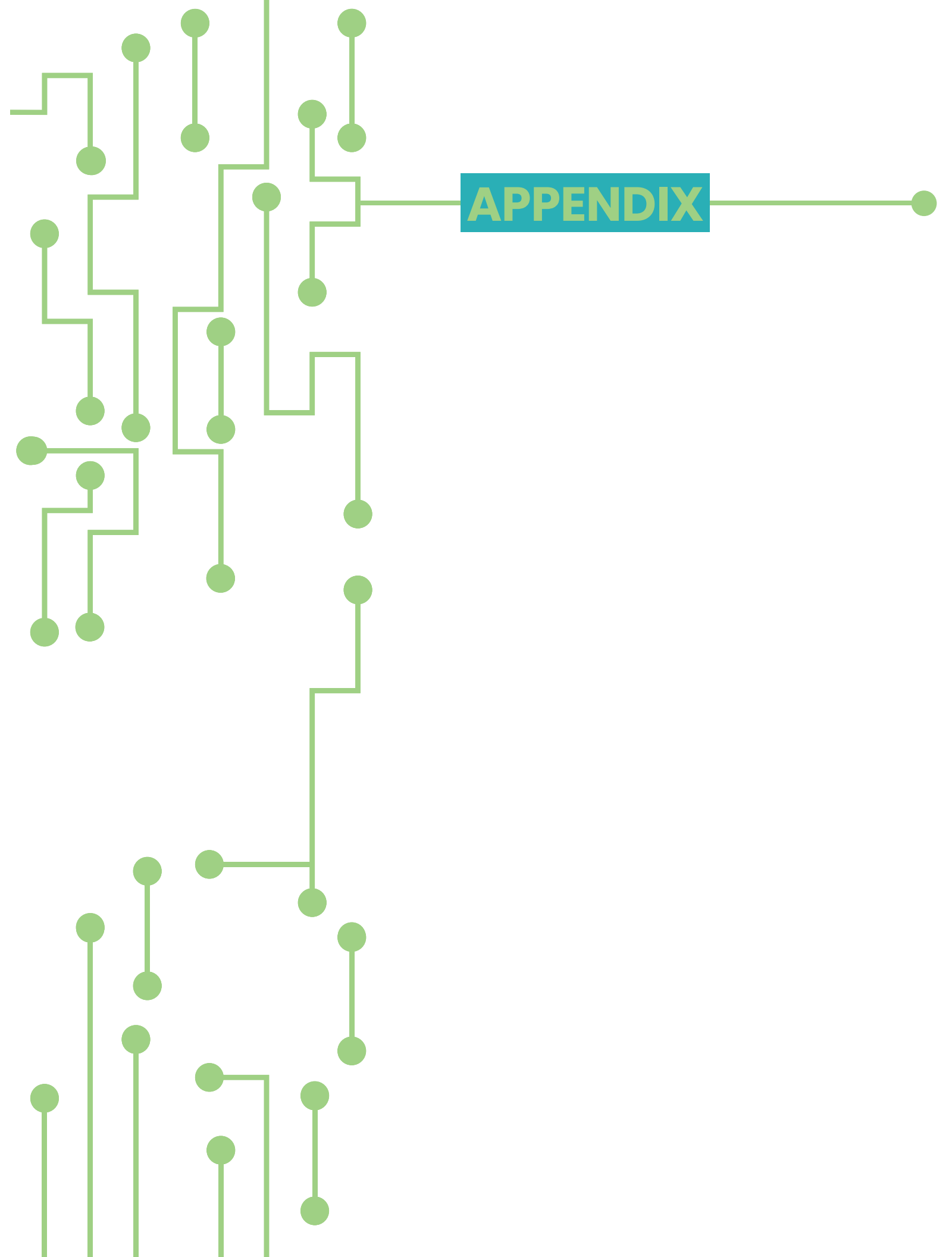
- A list of all Chapter Officers, their professional affiliations, their chapter officer positions, and their terms of office
- A list of all current chapter members with corporate title, institution or company name, postal address, phone, and email address
- Signed copies of the Chapter's Charter Agreement with FMS from the Chapter Officers for the Chapter's upcoming administrative year
- A Chapter financial statement displaying the most recent fiscal year's P & L Statement and a simple Balance Sheet displaying the financial condition of the chapter as of its most recent fiscal year-end
- A copy of the Chapter's most recent 990 filing: either a 990-EZ or 990-N, whichever is appropriate
- If the chapter provides CPE credit, a copy of the Chapter's NASBA Sponsor Registration Certificate
- The upcoming Chapter administrative year's dues structure (including both regular and affiliate members)
- Any changes to the Chapter's Bylaws or Articles of Incorporation that have been adopted over the previous Chapter administrative year



**CHAPTER AFFILIATION FEE** – Chapters pay the affiliation fee of \$750 annually to retain usage of the FMS logo, name, and services/resources rendered by National. The affiliation fee entitles the Chapter to its identification as an affiliate of the national organization, a license to use the FMS name and “FMS” trademarked logo within the Chapter's logo, and access to various FMS administrative and marketing services and supplies.



**CHAPTER FUNDS** – Chapters are largely responsible for handling and managing their own funds. Chapters can opt for National to receive and manage programming funds to be dispersed on a schedule decided upon by Chapter and National leaders. Funds for each chapter are placed in an individual chapter account and can be dispersed via wire transfer or check.



# CHAPTER CHARTER

FINANCIAL MANAGERS SOCIETY, INC.

Charter  
For

\_\_\_\_\_ Chapter

## ARTICLE I – NAME

The name of this organization shall be the \_\_\_\_\_ Chapter of the Financial Managers Society, Inc. For the purpose of identification and brevity, this \_\_\_\_\_ Chapter may hereinafter be referred to as the “Chapter,” and the Financial Managers Society, Inc. may hereinafter be referred to as “FMS”, or “the national organization.”

The Chapter is affiliated with the national organization of the Financial Managers Society, Inc., and nothing in this charter and any amendments hereto shall be in conflict with the certificate of incorporation, bylaws, regulations, policies and mission of FMS.

The Chapter is an independent legal entity, is independently incorporated, and maintains its own federal employment identification number from the Internal Revenue Service.

## ARTICLE II—BOUNDARIES

The boundaries of the Chapter shall encompass:

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(Description of territory).

## ARTICLE III – OBJECTIVES

The objectives of the Chapter shall be consistent with those of FMS, including the following:

1. To provide a forum for the sharing of experiences and expertise among financial, operational, risk management, and other personnel employed by financial institutions and supportive organizations,

2. To enhance the professional and personal development of financial, operational, risk management, and other personnel employed by financial institutions and supportive organizations.
3. To study operations, financial management, financial reporting, systems, procedures, accounting, risk management, internal auditing, or data processing techniques used by financial institutions and to devise ways and means of improving the same.
4. To promote high standards of practice in operations, systems, procedures, financial management and reporting, accounting, internal auditing, risk management or data processing.
5. To promote FMS activities on both a local and a national level and to encourage national involvement of chapter members whenever possible.

## **ARTICLE IV – CHAPTER MEMBERSHIP**

Membership in the Chapter shall be granted upon application and approval by the Chapter’s Board of Directors to individuals in financial institutions and organizations providing products or services to the financial services industry who live and/or work in the geographic area set forth in this charter.

Qualifications for membership and classes of membership within the Chapter shall be the same as those specified in the Bylaws of FMS and the Bylaws of the Chapter.

An individual may be a member of the Chapter without being a member of the national organization. However, in such instances, the Chapter is encouraged to have at least one national member from that individual’s institution or organization located within that chapter’s geographic boundaries as described in Article II of this Charter.

No member of the national organization may be denied membership in the Chapter if they live or work within the geographic territory of the Chapter.

## **ARTICLE V – ACTIVITIES**

1. The chapter will not operate for profit and will not undertake any action or practice that would jeopardize its exemption from the payment of federal income taxes as a taxexempt organization within the meaning of Section 501 (c)(6) of the Internal Revenue Code of 1954, as amended, or the corresponding provisions of any future United States revenue law.
2. For the purpose of carrying out its objectives, the Chapter will undertake activities that promote and develop the Chapter pursuant to guidelines and limitations prescribed by statute or by FMS.

3. No dividends or pecuniary profits will be declared or paid to the members of the Chapter or other private party except that the Chapter is empowered to pay reasonable compensation for products or services rendered. The Chapter may, at the direction of its Board of Directors, establish chapter-sponsored scholarship programs for secondary or college students, and make charitable contributions to recognized social agencies or causes selected by the Chapter’s Board.
4. No indebtedness shall be incurred nor any obligations made for or on behalf of the Chapter except upon approval of the Chapter’s Board of Directors.

## **ARTICLE VI – CHAPTER MANAGEMENT**

The Chapter is required to adopt bylaws that meet the requirements set forth in the FMS Sample Bylaws document attached to this charter.

The affairs of the Chapter shall be managed by its Board of Directors through its officers. The powers and duties of the officers and Board of Directors shall be defined in the Chapter’s Bylaws.

All chapter officers must be members of the national organization in addition to being members of the Chapter.

At no time will the Chapter have greater than 50% of its chapter officers from the “affiliate” class of its membership.

## **ARTICLE VII-MEETINGS**

All meetings and/or social events of the Chapter and the Board of Directors shall be held in accordance with the Chapter’s bylaws. At a minimum, the Chapter will hold two educational/professional development meetings for its members each year, and the Chapter will provide a minimum of eight hours of appropriate educational/professional development opportunities to its members each chapter year.

## **ARTICLE VIII-THE FMS AND CHAPTER RELATIONSHIP**

All FMS Chapters’ activities and programs have a direct bearing on the national organization’s mission, reputation, and brand. As a result, to ensure a consistency of mission, management, and oversight between the national organization and each of its chapters, the following is required of the Chapter:

At the beginning of the Chapter’s administrative year (ie. at the installation of new officers), the Chapter is required to submit to the national organization a Chapter Status Report provided by FMS with appropriate attachments. The report will consist of the

following:

- A list of all Chapter Officers, their professional affiliations, their chapter officer positions, and their terms of office
- A list of all current chapter members with corporate title, institution or company name, postal address, phone, and email address
- Signed copies of the Chapter's Charter Agreement with FMS from all of the Chapter Officers for the Chapter's upcoming administrative year
- A Chapter financial statement displaying the most recent fiscal year's P & L Statement and a simple Balance Sheet displaying the financial condition of the chapter as of its most recent fiscal year-end
- A copy of the Chapter's most recent 990 filing: either a 990-EZ or 990-N, whichever is appropriate
- If the chapter provides CPE credit, a copy of the Chapter's NASBA Sponsor Registration Certificate
- The upcoming Chapter administrative year's dues structure (including both regular and affiliate members)
- Any changes to the Chapter's Bylaws or Articles of Incorporation that have been adopted over the previous Chapter administrative year

In addition, the Chapter will pay a yearly affiliation fee, currently \$750, to FMS. The affiliation fee entitles the Chapter to its identification as an affiliate of the national organization, a license to use the FMS name and "FMS" trademarked logo within the Chapter's logo, and access to various FMS administrative and marketing services and supplies. The amount of the affiliation fee will be determined by the FMS Board of Directors periodically.

## **ARTICLE X- LIMITATIONS**

The FMS/Chapter relationship shall be managed by the national headquarters of FMS.

The Chapter shall have no right or authority to bind the national organization or to incur any financial or legal obligation on behalf of the national organization.

Chapter officers or other members of the chapter are not permitted to represent themselves as speaking on behalf of the national organization without the prior consent of the national organization.

When officers or other members of the Chapter publish any print or electronic materials or marketing collateral for the Chapter, the full name of the Chapter and its appropriate logo shall be used, and not those of the national organization.

## **ARTICLE XI- CHAPTER DISSOLUTION**

If for any reason the Chapter ceases to function, or in the event of its liquidation or dissolution, the Chapter must dissolve in accordance with the laws of its state of incorporation.

If within the provisions of its incorporation documents and at the dissolving Chapter's option, the Chapter's remaining assets may be distributed to FMS. However, if requested by the Chapter, FMS will escrow such distributed funds for a period of up to three years for the purpose of providing such funds to a qualified volunteer group seeking to re-create a new FMS Chapter in the dissolving Chapter's geographic area. If such funds are not utilized for such purpose within those three years, then at the end of that time period the funds shall revert to FMS and shall be used as the national organization's Board of Directors deems most appropriate.

## **ARTICLE XI I- REVOCATION OF CHARTER**

The Charter of the Chapter may be revoked by FMS' Board of Directors when, in the Board's judgment, the Chapter has been guilty of conduct contrary to its Charter and/or the national organization's mission, certificate of incorporation, bylaws, regulations or policies.

In the event of such a determination, the Chapter's license to use the FMS name and trademarked logo, and its affiliation with the national organization, shall be terminated.

Prior to such termination, however, a notice of probationary status shall be given in writing to the Chapter within thirty days of the Board's revocation decision, and the chapter will be placed on a 30 to 120-day probationary status beginning on the date of the Board's probationary notice.

If all infractions identified by the Board are not rectified by the end of that 30 to 120-day probationary period, the Chapter's license to use the FMS name and trademarked logo, its affiliation with the national organization, and its FMS Chapter Charter agreement will be immediately terminated.

The Chapter will have the right to appeal its probationary status, and/or expulsion, to the FMS' Board of Directors within 30 days of either decision.

## **ARTICLE XII I- SURRENDER OF CHARTER**

This Chapter's Charter may be surrendered voluntarily by action of two-thirds of the voting members of the Chapter. Notice of such intent to surrender the Charter shall be given in writing to the Financial Managers Society, Inc. at least 90 days prior to the Financial Managers Society, Inc. at least 90 days prior to the surrender date.

**ARTICLE XIV – AMENDMENTS TO THE CHARTER**

In the event that the Certificate of Incorporation or Bylaws of FMS, Inc. are amended in a manner which requires an amendment to this charter, such amendment, or any other amendment to this Charter deemed appropriate by the FMS Board of Directors, will be presented to all chapters at least six months prior to its enactment.

Any such amendment shall become effective only after this six-month notification period and only after a ratifying vote of the FMS Board of Directors within the last 60 days of the notification period.

Agreed to this \_\_\_\_\_ day of \_\_\_\_\_

By

\_\_\_\_\_

Chapter President

Accepted this \_\_\_\_\_ day of \_\_\_\_\_ By

\_\_\_\_\_

Chairman, Financial Managers Society, Inc.

**CHAPTER BYLAWS**

**INTRODUCTION**

The following is intended for use by chapters in the preparation of chapter bylaws which conform with the provisions of the national Financial Managers Society, Inc. Bylaws and Certificate of Incorporation.

The Financial Managers Society, Inc. Bylaws require chapters “to adopt bylaws consistent with the objects and purposes of FMS.” These sample chapter bylaws comply with this requirement and their adoption will ensure that chapter bylaws are in compliance with this obligation.

The establishment and operation of FMS chapters shall be consistent with these bylaws. While Articles I, II, III, IV, VI and IX must be adopted as presented, Articles III, V, VII and VIII leave to chapters a wide range of decisions and options, including, but not limited to, chapter governance, elections of officers, dues, meetings and committee appointments.

**CHAPTER BYLAWS**

**FINANCIAL MANAGERS SOCIETY, INC.**

**ARTICLE I. – NAME, CHARTER, AND JURISDICTION**

A. The name of this Chapter shall be the \_\_\_\_\_ Chapter of the Financial Managers Society, Inc., herein referred to as the “Chapter.”

B. This Chapter was created pursuant to the authority of and exists solely by reason of the Chapter Charter granted to it by the Financial Managers Society, Inc. Nothing in these Bylaws, and any amendment hereto, shall be in conflict with the Financial Managers Society, Inc. Chapter Charter Agreement.

C. This Chapter is an independent legal entity and independently incorporated.

D. The boundaries of the \_\_\_\_\_ Chapter shall encompass:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

(Description of territory).

**ARTICLE II. – OBJECTS AND PURPOSES**

A. Objects and Purposes. This Chapter shall pursue such objects and purposes as shall be consistent with those of the Financial Managers Society, Inc. including the following:

1. To study operations, financial management, systems, procedures, accounting, internal auditing, risk management or data processing techniques used by financial institutions and to devise ways and means of improving same.
2. To promote high standards of practice in operations, systems, procedures, financial management accounting, internal auditing, risk management or data processing.
3. To further the professional development of operations and financial executives, controllers, treasurers, accountants, internal auditors, risk managers or systems personnel employed by financial institutions and supportive organizations.

4. To provide a forum for the sharing of experience among operations and financial executives, controllers, treasurers, accountants, internal auditors, risk managers or systems personnel employed by financial institutions and supportive organizations.
5. To promote the Financial Managers Society and its activities on a local level, to cooperate with the Financial Managers Society in attaining and furthering its goals and the common goals of the Financial Managers Society and its chapters, and to provide prospective members for the Financial Managers Society, Inc.

B. Not for Profit. This Chapter shall not be operated for profit.

**ARTICLE III. – FISCAL YEAR**

The fiscal year of this Chapter shall be \_\_\_\_\_ .

A. Classifications. There shall be one class of member of this Chapter called regular members (hereinafter also referred to as “member” or “members”). Any person who is not qualified to be a regular member under Article IV, Section B, may request to become an affiliate (hereinafter also referred to as an “affiliate” or “affiliates”) with this Chapter provided that such person’s employment is with a business, agency or organization that provides services or products used in the operations, financial management, or risk management of a financial institution. An individual may achieve affiliate status in this Chapter by being approved for such status in accordance with the application rules and procedures established by the Board of Directors.

B. Member Qualifications. Any person shall be eligible for membership as a regular member in this Chapter who shall be:

1. An employee of a financial institution, its subsidiary corporation, or an organization that owns or is controlled by such financial institution:
  - a. who directs, or whose primary responsibility is in, the asset/liability management, accounting, planning, budgeting, investment, or operations function, or
  - b. who is an internal auditor or risk manager whose primary responsibility is auditing or risk management
  - c. who is responsible for information management, or data processing



C. Affiliate Qualifications. Any person shall be eligible for membership as an affiliate in this Chapter who shall be:

1. an employee of a company that provides services or products to financial institutions, or
2. an employee of a financial institution whose primary function is to market services to other financial institutions, or
3. an employee of a state or federal agency responsible for the regulation or supervision of financial institutions, or
4. an employee of a national, state, or local trade or educational organization, the purpose of which is to advance the interests of financial institutions.

D. Dues.

1. The amount of annual Chapter dues shall be established annually by the Chapter's Board of Directors.
2. Any member or affiliate who shall fail to pay dues in full when they become due shall be notified by written notice mailed or emailed to the last address of such member.

E. Cessation of Membership. Membership in this Chapter shall cease when a member or affiliate:

1. changes employment to a function or business that does not fulfill the qualifications as stated in Paragraph A and B of this Article, or
2. does not renew membership by payment of dues as stated in Paragraph D.2 above, or
3. is no longer employed in a function or business that fulfills the qualifications as stated in Paragraph A and B of this Article for a period of six months.

F. Resignation. Any member or affiliate of this Chapter may withdraw from membership or affiliate status by tendering a written resignation.

G. Expulsion.

1. Any member or affiliate of this Chapter who, by personal or business conduct, violates any of the Bylaws, rules, or resolutions of this Chapter, or who is guilty of conduct unbecoming a member or affiliate of this Chapter, may be suspended or expelled at any time by the Board of Directors.

Notice shall be given by the Board of Directors to such member or affiliate not less than thirty (30) days prior to setting forth the date set for the meeting of the Board of Directors at which said member or affiliate is to be expelled and the reasons for which expulsion is proposed, addressed to said member or affiliate at the last known address.

2. Any member or affiliate who has been suspended or expelled by the Board of Directors shall, within thirty (30) days after the date of such suspension or expulsion, be entitled to petition the Board of Directors for reinstatement. Thereafter, the Board of Directors shall determine whether the suspension or expulsion shall be altered or revoked.
3. No member or affiliate who has been expelled shall be eligible for reinstatement of membership or affiliate status for at least one year from the date of expulsion and shall not be re-admitted until all arrears in dues and/or other obligations to the Chapter shall have been paid.

H. Forfeiture. Any member or affiliate whose membership or affiliate status in this Chapter shall be terminated by resignation, cessation of employment, expulsion, or other cause shall forfeit thereby all rights of membership or affiliate status in the Chapter.

## **ARTICLE V. – RIGHTS OF THE MEMBERS** **(Choose either option 1 or 2, or a combination thereof)**

### **Option 1**

A. Voting. Each regular member and affiliate shall be entitled to one vote upon any question coming before any meeting of the members. Voting by proxy and cumulative voting shall not be permitted.

B. Holding Office. Each regular member and affiliate shall be entitled to hold any office to which that member is duly nominated and elected or appointed.

## **ARTICLE V. – RIGHTS OF THE MEMBERS**

### **Option II**

A. Voting. Each regular member shall be entitled to one vote upon any question coming before any meeting of the members. Affiliates are not eligible to vote. Voting by proxy and cumulative voting shall not be permitted.

B. Holding Office. Each regular member shall be entitled to hold any office to which that member is duly appointed or elected. Affiliates are not eligible to hold office.

## ARTICLE VI. – MEETING OF THE MEMBERS

### A. Meetings.

1. Regular Meetings. This Chapter shall hold at least two (2) meetings of its members each year (one of which may be its annual meeting) to conduct such business as may come before the meeting and provide at least eight (8) hours of technical and/or professional programming. The time and place of such meetings shall be fixed by the Board of Directors.
2. Special Meetings. Special meetings of this Chapter may be held upon call by the Board of Directors or upon request in writing by not less than twenty-five percent (25%) of the members.

B. Notice. Written notice of the time, place, and purpose of any meeting shall be given to each regular member of this Chapter either personally, by letter mailed to the member's last known address, or via email at least five (5) days in advance of the date fixed for such meeting.

C. Quorum. Any number of regular members present at a regular or special meeting of members shall constitute a quorum. A majority of all votes cast at any meeting of members shall determine any question unless herein otherwise provided.

D. Order of Business. Where procedure is not otherwise provided, Robert's Rules of Order shall control.

## ARTICLE VII. – BOARD OF DIRECTORS

A. Governing Body. The Board of Directors shall be the governing body of the Chapter. The Board may consist of the chapter officers, or, the chapter officers and additional members as the Chapter sees fit.

B. Meetings. Regular meetings of the Board of Directors shall be held at such intervals as shall be determined from time to time by resolution of the Board. Such regular meetings may be held without notice of the time and place except through announcement at the last regular meeting. Special meetings of the Board of Directors may be called by the president on five (5) days' notice of the time and place and purpose thereof served personally, by mail, or via email.

C. Quorum. A majority of the total number of members authorized for the Board of Directors shall constitute a quorum for the transaction of business at any regular or special meeting of the Board. A majority of all votes cast at any meeting of the Board of Directors shall determine any questions unless herein otherwise provided.

## ARTICLE VIII. – OFFICERS

A. Number. The officers shall be a president, a vice president, a secretary, and a treasurer, who shall be elected by the members. In addition, the chapter president may appoint each year a program chairman, a membership chairman, a project chairman, and any other chairman of a specialized area of interest to serve during the president's term of office.

B. Election of Officers. Chapter officers shall be elected from the membership at the annual meeting of the Chapter or at a time that best fits the needs of the Chapter. Officers shall be elected to the same office for no more than consecutive term(s).

C. Term of Office. Each officer shall be elected for a term of \_\_\_\_\_ year(s) and shall hold office until a successor is qualified and elected.

### D. Duties of the Officers.

1. President. The president shall be the chief executive officer and shall preside at all meetings of the members of this Chapter and the Board of Directors. The president shall provide a high standard of professional leadership and shall be responsible for the functioning of all other officers whether elected or appointed. Programs promoting the objects and purposes of this Chapter shall be the prime responsibility of the president.
2. Vice President. The vice president shall perform such duties as may be directed by the president and shall, in the absence or disability of the president, assume the responsibilities of the president.
3. Secretary. The secretary shall keep minutes of each meeting, mail notices of meetings to regular members, and maintain accurate membership records.
4. Treasurer. The treasurer shall collect all dues; shall have established proper accounting procedures and records for the keeping of the funds in such banks, credit unions or trust companies as approved by the Board of Directors. The treasurer shall report on the financial condition of the chapter at all meetings of the Board of Directors and at other times when called upon by the president.
5. Program Chairman. The program chairman shall be appointed by the president and be responsible to the president for developing, arranging, and presenting chapter programs.
6. Membership Chairman. The membership chairman shall periodically solicit all financial institutions within the organization's geographic area of influence to encourage qualified operations officers and financial managers to participate as members.

7. Project Chairman. The project chairman shall be responsible for organizing and developing needed operations and financial management research projects on subjects of special interest and value.

E. Vacancies. A vacancy in any elective office may be filled for the balance of the unexpired term by majority vote of the members present at any regular or special meeting of the members, or may be filled by appointment by the president and approval by the Board of Directors.

## ARTICLE IX. – AMENDMENTS

These Bylaws may be amended at any regular meeting of the membership by a two-thirds (2/3) vote of the members present and entitled to vote provided that the amendment has been submitted in writing at a previous regular meeting.

# RESPONSIBILITIES OF CHAPTER OFFICERS

## PRESIDENT

### General Duties –

- Set direction and tone for Chapter including planning of goals for the year
- Secure sponsorship for events
- Recruit new members
- Represent Chapter at National and Regional Events
- Collaborate with FMS National and other Chapters as needed
- Set schedule/location for Board Meetings
- Prepare membership letter to be mailed with membership registrations
- Prepare sponsorship letter to be sent to solicit sponsorship
- Prepare submission for National Awards

### Monthly Duties –

- Work with other chapter officers/directors to coordinate details for meetings
  - (See list of responsibilities for other officers)
  - Recommended practice to send reminder e-mails to ensure all responsibilities are covered for meetings
- Work with other officers to ensure smooth running of chapter and meetings including:
  - Selecting speakers and topics
  - Securing sponsorship
  - Monitoring & maintenance of website
  - Membership registration/issues
- Budget/financial issues
  - Give welcome and updates at monthly meetings
  - Thank sponsors & speakers
  - Welcome special guests
  - Remind of CPE sign in and forms
  - Membership registration reminders & updates
  - Upcoming events (including next meeting, ECR, National)
  - Reports from Treasurer & Secretary
  - Reminder to leave nametags
- Give introduction for speakers
- Conduction Raffle
- Send thank-you letters to sponsors and speakers

## **VICE PRESIDENT**

### General Duties –

- Work with venues to coordinate details of monthly meetings including:
  - Reserve dates and sign contracts for meetings
  - Menu selection
  - A/V equipment, setup for speakers
  - Layout of room (including reserved tables)
  - Headcount for meeting
  - Any other details for the establishment of the meeting
- Work with other chapter officers/directors to coordinate details for meetings
  - Coordinate speakers/topics/handouts/materials/resources needed (in conjunction with committee)
  - Order signs to recognize sponsors
  - Coordinate CPE materials (with CPE coordinator)
  - Arrange person for invocation
  - Other items for specific meetings (e.g., awards)

### Monthly Duties –

- Work with President and other officers to ensure smooth running of chapter and meetings including:
  - Selecting speakers and topics
  - Securing sponsorship
  - Monitoring & maintenance of website
  - Membership registration/issues
  - Budget/financial issues

## **TREASURER**

### General Duties –

- Record payments/bank deposits for all Chapter activities including the following:
  - Annual dues
  - Monthly meetings fees and expenses
  - Sponsorships
  - Operating Expenses
- Fill out W-9 forms that are sent throughout the year
- Send sponsorship invoices out to vendors for payment
- Send attendance numbers and current Treasury balance from each dinner meeting to the Secretary to be recorded on the official meeting minutes.
- Member Directory
  - Coordinate / reconcile paid members to the current directory sent by the Secretary
- Year-end cash flows and financial statement preparation
  - Summary of meeting profit/loss should be prepared and provided to Officers after each meeting
  - Year-to-date Cash flows should be provided to Officers on a monthly basis to monitor the Chapter's financial position and budget projections
  - Prepare year-end Treasury reports
  - Provide financial schedules to the designated tax officer for preparation of tax returns

- Responsible for primary collection efforts for past due balances of fees and sponsorship

### Monthly Duties –

- Work the registration table at the monthly meetings with the Secretary – bring a current registration list
- Coordinate with Vice President one week before meeting to provide an attendance number to the venue for each meeting
- Coordinate list of attendees with the individual responsible to print name tags for meeting – take nametags to and from the meetings.
- Bring checkbook to dinner meeting to pay bill and raffle prize
- Balance of current treasury is to be disclosed at every meeting.

## **SECRETARY**

### General Duties –

- Update database with all registration forms for current year
- Complete the official minutes for each dinner meeting (these will all be submitted at the end of the year)
- Member Directory –
  - Compile database and send to printer
  - Format database output and insert to the format for the directories.
- Complete annual update of Officers for FMS National after May Installation Dinner

### Monthly Duties –

- Monthly Board Meeting Notice – create notices for all meetings
  - Preparation includes verification of all speakers, topics & sponsors
  - Circulate notice to President, VP and Treasurer for input / approval
  - Notices should be mailed out 2 weeks before the RSVP date
  - Notice needs to be added to the FMS website
  - Notice needs to be forwarded for preparation of programs
- Work the registration table at the monthly meetings with the Treasurer – bring a current listing of members to answer questions as members check in
- Current membership count to be reported each meeting

### Board Meetings –

- Take meeting notes and email to all officers for approval and then to all board members after the meeting

# EXAMPLES OF RECRUITMENT MATERIALS

Collateral to promote membership is useful to send prospective members, for chair drops at an event, and to post online to the website and social media.



**MEMBERSHIP FLYER** – Provided is the membership flyer used by FMS National to promote membership and benefits. National is developing a flyer specifically for chapter membership.



**FMS forward MAGAZINE AD** – Ad space in *FMS forward* is used to promote chapter membership. The magazine is distributed bimonthly to members and provided as collateral at events.



**CHAPTER DUES DEDUCTION FLYER** – Chapter members are eligible to deduct their chapter dues from the National membership rate up to \$75.

Examples of recruitment materials can be found on Appendix pages X-X.

## TOP 5 REASONS TO JOIN FMS

Joining the Financial Managers Society (FMS) can be extremely beneficial for finance professionals in the banking industry who are looking to expand their knowledge, network, and gain access to premier education and the latest research in your field.



**IMPROVE REPUTATION AND VISIBILITY**  
Gain a professional competitive edge. FMS rewards excellent performance through our certification program and awards.

*Take part in FMS seminars, offering at least 12 CPE credits each – on topics such as ALM modeling, CECL, and new regulations, bringing you innovative ideas and best practices.*



### INFORMATION AND RESOURCES

Access to important industry news and insights in the financial industry.

*Membership grants exclusive access to FMS forward (6 issues/yr), FMS Research (6 issues/yr), and FMS Update (52 issues/yr), which helps you seek new opportunities for growth and breakdown obstacles.*



### EDUCATION

FMS offers a number educational opportunities including everything from complimentary webinars, conferences and seminars.

*Experience over 30 complimentary FMS OnDemand webinars - view wherever & whenever your schedule allows*



### NETWORKING

Connecting with like-minded people in your industry is crucial and FMS provides a collaborative environment that provides learning opportunities, the exchange of ideas, and beneficial relationships to help you grow in the industry.

*Network and connect with more than 500 of your industry peers at the annual FMS Forum, and earn up to 15 CPE Hours*



### BEST PRACTICES

If you are just starting out, entering a new role, or want to keep up-to-date on best practices FMS has resources to help you learn the best practices that govern our industry and keep you in the know.

*Sign up for more than 20 complimentary FMS webinars each year offering insights into unique trends and best practices with over 20 CPE credits.*

# STAY CONNECTED

## with FMS and Join Your LOCAL CHAPTER

Gain access to even more FMS **education** and **networking** by joining your local chapter and connecting with industry peers in your community.

*Chapter members receive \$75 off of their national dues*

### JOIN YOUR LOCAL CHAPTER

*Visit [FMSinc.org/Chapters](http://FMSinc.org/Chapters)*

**BOSTON**

**CHICAGO**

**DALLAS-FORT WORTH**

**NEW YORK/NEW JERSEY**

**OHIO VALLEY**

**PHILADELPHIA**

**SOUTHEASTERN**

**WISCONSIN**

## CHAPTER/NATIONAL DUAL MEMBERSHIP APPLICATION

Maximize your membership with our new **FMS National/Chapter Dual Membership Program\***. Members of an FMS chapter can now deduct their membership dues from an FMS national membership.

1. Join/renew your membership with your local chapter
2. Save your receipt for your chapter dues
3. Complete the below form and return it to FMS with your chapter dues receipt.
4. We'll deduct your chapter dues, up to \$75, from your national membership and you'll begin to enjoy all the benefits FMS Dual Membership has to offer!

*\*Individuals that are members of multiple chapters may only deduct one*

### 1. CONTACT INFORMATION

Name \_\_\_\_\_ Title \_\_\_\_\_ Company \_\_\_\_\_ Mailing Address \_\_\_\_\_ City, State, Zip \_\_\_\_\_ Home Phone \_\_\_\_\_ Business Phone \_\_\_\_\_ Fax \_\_\_\_\_ E-mail \_\_\_\_\_ Informal Name \_\_\_\_\_ Birth Year \_\_\_\_\_

Name of Chapter \_\_\_\_\_ Amount of Chapter Dues \_\_\_\_\_

**SEC Registrant:**  Yes  No

**Are you a CPA?**  Yes  No

**On LinkedIn?**  
Follow us at @ Financial Managers Society, Inc and we'll follow you at: \_\_\_\_\_

### 2. ASSET SIZE

- Less than \$100 Million  \$101 - \$249 Million  \$250 - \$499 Million  \$500 - \$999 Million  
 \$1 - \$4.99 Billion  \$5 - \$9.99 Billion  \$10 Billion or Greater

### 3. INSTITUTION TYPE

- Commercial Bank or FDIC Savings Bank  Accounting Firm/Law Firm  Broker/Dealer, Investment Bank  
 OCC-regulated Thrift  Hardware/Software Vendor/DP Service Bureau  Consulting Firm  
 Credit Union  Other: \_\_\_\_\_

### 4. PRIMARY JOB FUNCTION

#### PROFESSIONAL MEMBERS:

*(FMS Professional Members are individuals employed by a community bank, thrift or credit union)*

- President/CEO  CFO  
 Treasurer/Investment Officer  Accounting/Finance  
 Risk Management/Compliance  Internal Auditor  
 Operations/Information Technology  Controller  
 Other: \_\_\_\_\_

#### PARTNER MEMBERS:

*(FMS Partner Members are defined as employees of companies that provide products or services to financial institutions.)*

- Partner/Principal/Manager  
 Sales/Marketing  
 Consultant  
 Financial Analyst  
 Other: \_\_\_\_\_

### 5. MEMBERSHIP CATEGORY AND PAYMENT

#### MEMBERSHIP CATEGORY:

Professional Member	\$525	Partner Member	\$545
Chapter Dues Deduction	- \$75.00	Chapter Dues Deduction	- \$75.00
<b>TOTAL DUE:</b>	<b>\$450</b>	<b>TOTAL DUE:</b>	<b>\$470</b>

- Check enclosed payable to Financial Managers Society Card # \_\_\_\_\_ Exp. \_\_\_\_\_
- Charge my VISA, MasterCard or American Express Signature \_\_\_\_\_

Dues payments to FMS are not deductible as a charitable contribution but may be deductible as a business expense. Please consult your tax advisor for specific advice.



# CHAPTER MEETINGS

Meetings should be hosted throughout the year to engage members through programming and provide chapter updates.



**BUSINESS MEETINGS** – Chapters should conduct business meetings with the executive council and full leadership team present. Summaries of chapter business meetings should be made available to members through reporting at general meetings or in the form of email newsletters.



**ELECTION MEETINGS** – Chapter members should meet once per year to elect chapter officers for the next year.



**PROGRAM MEETINGS** – Program meetings can offer meals or refreshments at the time selected by the chapter officers. The format of the meeting should generally stay the same but can include additional elements such as a networking or cocktail hour.

- Welcome by the chapter chair/president
- Speaker Introduction
- Presentation
- Question and answer session
- Closing statement from chapter chair/president and updates

# IDEAS FOR CHAPTER ACTIVITIES

In addition to regular chapter meetings, member and non-member engagement can be extended to other activities and events. Social, entertainment, and volunteer programs are a great way to connect members and other professionals to the chapter.



**BYOB (Bring Your Own Banker)** – At any event, social or educational, encourage attendees to bring a staff member or co-worker. This can aid in growing the prospect list and connecting with non-members.



**COMMUNITY SERVICE** – Invite professionals in your area to give back to the local community through programs with Toys for Tots, Habitat for Humanity, a food bank or pantry, etc.



**EXPERT SPEAKER SERIES** – Invite industry experts to speak with your chapter on a topic of your choice. Breakfast, lunch, or dinner can be provided. Connect with the speaker and begin publicizing four to six weeks out for a great turn out.



**GOLF OUTING** – Chapters can rent the golf course, provide breakfast, and host a casual networking reception to engage members in a round of golf and activities.



**HOLIDAY PARTY** – Celebrate the holidays together with food, drinks, games, and prizes. A great chance to get to know members and engage before the end of the year.



**MIXERS/SOCIAL EVENTS** – Host an event where the sole purpose is to meet and greet. Select a location that will allow attendees to relax. Consider entertainment venues that offer food, drinks, and activities.



**SPORTS OUTING** – Host a day/night at a local sporting event with members and non-members. Tickets can likely be discounted for large group ticket purchases.

*Marketing examples can be found on Appendix pages X-X.*



# EXAMPLES FOR CHAPTER ACTIVITIES



FMS Financial Managers Society Wisconsin Chapter

## JOIN US

FOR THE

# 2ND ANNUAL BREWERS GAME

### NETWORKING OUTING

**JUNE 13, 2018 • 1:10 PM**  
Miller Park's All-Inclusive Aurora Healthcare Bullpen

Members	\$75
Non-Members	\$100

**REGISTER**



Financial Managers Society  
1 North LaSalle Street, Suite 3100  
Chicago, IL 60602  
[Email Us](#) | [800-ASK-4FMS](#) | [View Our Website](#)

[Unsubscribe](#) from all FMS emails.



FMS Financial Managers Society Philadelphia Chapter

AUG 2018

## ANNUAL GOLF OUTING

August 6 | 11:00 AM  
Talamore Country Club  
Ambler, PA

**FOOD • PRIZES • FUN**

\$200.00 per golfer  
\$225.00 per golfer  
*(After July 27, 2018)*  
\$75.00 dinner only

**REGISTER TODAY**




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1 North LaSalle Street, Suite 2225  
Chicago, IL 60602  
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[Unsubscribe](#) from all FMS emails.

**FALL EDUCATION**

Join the New York/New Jersey Chapter for fall education and networking. Connect with your peers while receiving relevant industry updates and knowledge.



**Thursday, November 15**

6:00 PM - 9:00 PM  
Dave and Busters - Wayne, NJ

Network with your peers and get connected with bankers in your community.

Price:  
\$50 per person  
BYOB - Bring your own banker and get FREE entry for two.

**REGISTER**



**Tuesday, November 27**

The Berkeley Hotel - Asbury Park, NJ

Join us for a half-day seminar with New Jersey Bankers.

**LEARN MORE**



**Wednesday, December 5**

The Fiesta - Wood-Ridge, NJ

The holidays are fast approaching. You know what that means? It's time to celebrate!

**LEARN MORE**



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# EXAMPLES OF WEBSITE CONTENT

Code of Conduct | FMSinLaw | Sign In

**FMS** Financial Managers Society  
Wisconsin Chapter

ABOUT | MEMBERSHIP + | EVENTS + | OFFICERS | CAREER CENTER | CONTACT US

## JOIN WISCONSIN TODAY

EXPAND YOUR KNOWLEDGE AND NETWORK IN YOUR OWN BACKYARD WITH YOUR LOCAL COMMUNITY

**LEARN MORE & REGISTER**

**MEMBERSHIP**  
The Wisconsin Chapter has two types of membership: Professional and Partner. Learn which one best suits you.  
**LEARN MORE**

**JOIN**  
The Wisconsin Chapter is a network of finance professionals and the only thing missing is you! Join us and expand your knowledge and network with professionals in your area.  
**JOIN NOW**

Magazine | FMSin | FMS Connect | Store | Cart | Join | Sign In

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## Chapter Events

Events by Type

All Events | Seminars | Virtual Education | Webinars | Chapters | FMS School | Conferences

Click Section Titles to Sort Order

Begin Date	End Date	Event Title	City	State	Details
Feb 20, 2019	Feb 23, 2019	NY-NJ Chapter: February Mini-Session	Hackensack	NJ	<a href="#">Learn More</a>
Feb 20, 2019	Feb 23, 2019	NY-NJ Chapter: February Dinner Meeting	Hackensack	NJ	<a href="#">Learn More</a>
Mar 21, 2019	Mar 21, 2019	NY-NJ Chapter: Charity Casino Night	Paterson	NJ	<a href="#">Learn More</a>
Apr 12, 2019	Apr 12, 2019	NY-NJ Chapter: Half Day Seminar With New Jersey Bankers	Hackensack	NJ	<a href="#">Learn More</a>
May 17, 2019	May 17, 2019	NY-NJ Chapter: 2019 Installation Dinner Dance	Township of Washington	NJ	<a href="#">Learn More</a>

Magazine | FMSin | FMS Connect | Store | Cart | Join | Sign In

**FMS** Financial Managers Society

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**CHAPTER EVENT** **March 21, 2019 | Paterson, NJ**

**New York-New Jersey Chapter: Casino Night**  
For the Lupus Foundation and HomeSharing Inc.

March 21, 2019

**Program Description**

Dinner, Open Bar, Music, and Prizes

Funds raised will benefit The Lupus Foundation & HomeSharing Inc.

**Agenda**

**6:00 - 10:00 PM**  
Casino Night

**Sponsorships**

**ACE OF SPADES \$2,000**  
8 Tickets + \$1,200 Chips & 8 Boards

**KING OF HEARTS \$1,500**  
6 Tickets + \$500 Chips & 6 Boards

**QUEEN OF DIAMONDS \$1,000**  
4 Tickets + \$600 Chips & 4 Boards

# EXAMPLES OF eMARKETING MATERIALS



## CYBERSECURITY

Challenges and Preventative Actions to Take

**One Week Left - RSVP Today**  
Join Us In Dallas for Complimentary CPE & Networking

The upcoming FMS Dallas Chapter event is quickly approaching, and we don't want you to miss out. As the Dallas area chapter continues to grow we want to connect you to your peers, quality education, CPE, and the tools you need to succeed in the industry.

RSVP to attend on **Thursday, August 30th** as we connect and discuss Cybersecurity: Challenges and Preventative Actions to Take. Earn CPE, enhance your knowledge, and grow your network in Dallas. Lunch is on us!

**SPEAKER/SPONSOR**  
Brought to you by our partners at Crowe, LLP with guest speaker Lucas Morris, Risk Senior Manager.

**CPE CREDIT**  
Earn up to 1 credit hour of CPE

**NETWORK WITH YOUR PEERS**  
Expand your network in Dallas!

**TIME AND LOCATION**  
Thursday, August 30 from 11:30 AM - 2:00 PM  
Maggiano's Restaurant: 6001 West Park Blvd • Plano, TX



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The Stony Hill Inn  
Hackensack, NJ

October 18, 2018  
5:30 - 8:30 PM

# REGISTER TODAY

## Chapter Dinner Meeting & Mini-Session

Members	\$80
Non-Members/Guests	\$95

[LEARN MORE & REGISTER](#)



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