



# Dallas News February 2012

## Dallas Association for Financial Professionals

DAFP Website [www.dallasafp.org](http://www.dallasafp.org)

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### President's Corner for February 2012

The year has begun with the "ball rolling", literally at the January Holiday Party at 300 Dallas in Addison. Members and their guests enjoyed a dinner buffet and conversation catching up with everyone from the holidays and then we tried our hand at some bowling. I don't get to bowl that often but after knocking a few pins around I was ready to go for more. Thanks to Lori Littlefield for planning our Holiday Party and look forward to our next special event this summer.

The Board held their annual two day retreat in January where we began planning for 2012. In reviewing 2011, we ended the year with a total of 198 members. Membership renewals got off to a great start in December and with the generous support of our Education Day sponsors we exceeded our budgeted revenue putting us under budget for the year.

Our first program of the year will be February 16<sup>th</sup> at the DoubleTree Campbell Centre featuring a presentation on treasury management systems. Registration is open so be sure to make your reservations now for this very informative program. Karyn Brown has been busy putting the final touches on our programs for the first half of the year and we look to have another great line up. Our joint lunch program with the Fort Worth AFP at Six Flags on April 19<sup>th</sup> will be new and different as we will hear a presentation about the business of running an amusement park and tour one of the most popular destinations in Texas. Be sure to read on for more details on our upcoming programs and check the website for updates.

If you have not already done so, be sure to renew your membership. We would also be glad to have our many guests join us as members for 2012. Our new and improved user friendly website makes dues payment a breeze complete with payment records and receipts from your own member portal. For \$275, it's still one of the best values you will find with 7 monthly dinner meeting programs, two special event parties, networking, CTP credits and Education Day which is worth the price of admission alone.

TEXPO is just around the corner March 25-27 at the InterContinental Hotel in Addison. Be sure to check out the great line up of programs and keynote speakers and consider attending if you have not already registered at [www.texpoconference.org](http://www.texpoconference.org) For those interested in a round of golf, Steve Bohn has put together a great tournament at Brookhaven Country Club.

**Ross Staffel, CTP**  
**President**



## *Members Earning Interest*

Do you have an announcement of a promotion, job change or major event in your life? Or, do you know someone else who has exciting news? Send the information to Ross Staffel at [ross@staffel.com](mailto:ross@staffel.com) or Ray Vines at [ray.vines@radioshack.com](mailto:ray.vines@radioshack.com) and we'll spread the news and celebrate with you.

## *Membership Information*

To All Dallas AFP Membership,

I can't believe it, but it is time for DAFP membership renewal once again! I don't know about you, but the year has flown by. I sincerely hope that you have made room in your budget for the Dallas AFP and we encourage you to renew your membership for 2012 starting this month.

For \$275, you have access to fantastic educational programs for CTP/CPE credits, numerous networking opportunities, exciting social events and a thriving job bank. Please visit [www.dallasafp.org](http://www.dallasafp.org) and click on "Click here to renew" to renew your membership.

If you have any questions or concerns about the renewal process, please email [membership@dallasafp.org](mailto:membership@dallasafp.org).

**Chuck Landry**  
**Membership Chair**

## *Community Involvement Event Update*

Our first Community Involvement event for 2012 will be with "My Possibilities." Stay tuned for additional details.

Thank you,

**Shawn Ahsan**  
**Community Involvement Chair**

## *A note from our Special Events Chair*

Got an idea for a Summer Social event? Email your ideas to [socialevents@dallasafp.org](mailto:socialevents@dallasafp.org)

**Lori Littlefield, CTP**  
**Policy/Special Events Chair**

*Program Chairperson Message*

We're taking our traditional year-end break and the Holiday Party is in January, so we don't have another official dinner program meeting until February. Here is the schedule for the first part of 2012 so you can save the dates on your calendar.

**February 16, 2012**

**Place: DoubleTree Campbell Centre**  
**5:30 – 6:15 Cocktails & Networking**  
**6:15 – 8:00 Dinner and Program**

**Topic: Treasury Technology**

*Speakers:*

*Tracey Knight, Reval*

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**March 15, 2012**

**Place: Hilton Lincoln Centre**  
**5:30 – 6:15 Cocktails & Networking**  
**6:15 – 8:00 Dinner and Program**

**Topic: How To Lawsuit Proof Your Business**

*Speakers:*

*Bret Madole, Attorney*  
*Eric Scott, Attorney*

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**Joint Meeting with Fort Worth and CFMA**

**April 19, 2012**

**Place: To Be Determined**  
**11:00 – 11:45 Networking**  
**11:45 – 1:00 Lunch and Program**  
**1:00 – 2:00 Venue Tour**

**Members: Free      First Time Guests: Free      Guests: \$50**

Approved for 1.2 CTP recertification credit by the  
Association for Financial Professionals.

Karyn Brown, CTP  
Program Chairperson



**Stacy Roth, CTP**

2012 TEXPO Chairman/ATTA Representative

**Stephanie Potter, CTP**

2012 TEXPO Vice-Chairman/ATTA Representative

The article this month will be Q&A. Hope you enjoy! (Hey, it ain't easy writing something every month!!!)

**Question:** What is this? **march 25**

**Answer:** It's March 25 getting closer! Yep, the tee-off to TEXPO 2012 is just around the corner. Be sure to make your reservations as soon as possible to get the lowest conference registration price.

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**Question:** What do soccer, bobsledding, Wii, laser shooting and the Bunny Hop have in common?

**Answer:** They're all activities we'll be playing on Monday night as we "Let the Games Begin" at our Victory Party!

**Carole Stauffer** and her committee have planned two amazing nights of fun. During our Sunday evening reception, plan to pick up a game of darts or try your hand on the putting green as TEXPO goes international in our own British pub, complete with The Beatles in the background. Monday evening, the TEXPO Games will open and I'm sure there will be lots of friendly competition among all the virtual games and some pretty funny moves on the dance floor.

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**Question:** What's 10'x10' yet fills a ballroom?

**Answer:** 70 display booths filling the TEXPO 2012 Exhibit Hall.

As of the writing of this newsletter, the Exhibit Hall is just over 85% full. We feel very confident that we'll max out the Hotel InterContinental ballroom thanks to our exhibitors!! Thanks to **Alan Bruton** and team!

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**Question:** What does it mean when someone is "going green"?

**Answer:** Nope, they aren't going electronic.....they're signing up for the TEXPO Open Golf Classic hosted at Brookhaven Country Club!!

Under **Steve Bohn**'s guidance we're opening the Golf Classic this year to any TEXPO supporter--attendance at TEXPO isn't required. Don't miss out on a great start to TEXPO!

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**Question:** What do you get when you add 18.6, 20 and 11.25?

**Answer:** Renewal credits for your CTP, CPA or GTOT credentials!

Congrats to **Karyn Brown** and committee for their efforts bringing us the biggest TEXPO education offering **EVER!** TEXPO has never been approved for this many renewal credits. We're also very pleased that we're rolling out our inaugural Executive Track and revised Essential Learning for the CTP candidate.

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**Question:** How can a banker outreach a practitioner?

**Answer:** When the banker is telling the practitioner about TEXPO! Get it? Outreach = reaching out!! ☺

**Trish Herskovitz** and **Cameron Dime** are doing an amazing job getting the word out to potential TEXPO attendees. In addition to e-blasts and mailed brochures, we're going electronic this year with a big LinkedIn push---thanks to everyone for reposting information. And, Trish and Cameron have developed a targeted marketing plan that highlights the education sessions of interest for targeted industries.

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**Question:** Who said "Cash is Cash. The rest is just journal entries!!"

**Answer:** **Ray Vines**, our wonderful Treasurer, who keeps us between our budget lines and reminds us that verbal commitments aren't cash!

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**Question:** Who said "Book 'em, Danno?"

**Answer:** Nope, it isn't someone on Hawaii Five-O. It's our own **Stephanie Potter** who's busy putting together a listing of books that have been published by many of our education session speakers. After hearing their talks, we're certain you'll want to go home and buy their books. Stephanie has also been very busy at work planning for our two key note speakers and arranging for our sponsor VIP receptions.

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**Question:** Where can I register for TEXPO?

**Answer:** [www.texpoconference.org](http://www.texpoconference.org)

Come join us!!!  
Stacy

**TEXPO 2012.....*Striving for Excellence!***

### *From the of Desk of the Education Day Conference Chair*

While it may seem like September 2012 is more than half a year away, it really is just around the corner when it comes to planning a major event for our organization such as the Dallas AFP Education Day. A key ingredient for a successful Education Day conference will be an active and creative committee of Dallas AFP volunteers. We plan to begin committee meetings in February, so please consider your participation in the planning and execution of this important event and let me know of your desire to be a part of the team.

For banks, financial service providers and other vendors who are planning marketing and advertising opportunities for 2012, please consider Dallas AFP's Education Day Conference as a worthy investment of your marketing dollars. There will be several sponsorships available during the full-day conference:

- Networking Breakfast Sponsorship for \$1,500
- Luncheon Keynote Sponsorship for \$2,000
- Cocktail Reception Sponsorship for \$1,500
- 3 Door Prize Sponsorships for \$500 items such as iPad, Travel, etc

As usual we plan to have a solid line-up of speakers to provide education and training for our membership and guests. If someone in your organization or network of contacts has an interesting presentation about a financial topic that you would like to submit for consideration, please let us know and we can provide the Speaker Proposal Form.

For more information about sponsorship, speaker opportunities and to join the committee, please email [acox@tmaholdings.com](mailto:acox@tmaholdings.com) or telephone 214.797.0789.

**Annette Cox, CTP**  
**Conference Chair**

## *AFP Announces*

### **AFP Develops First Certification in Corporate FP&A**

*New credential fills need for forecasting, budgeting, scenario planning standards; follows success of AFP's Certified Treasury Professional TM credential*

WASHINGTON, DC – February 7, 2012 – The Association for Financial Professionals (AFP), the professional society for treasury and finance, is pleased to announce the development of the first certification for the corporate financial planning and analysis (FP&A) profession.

Serving professionals who perform FP&A work on behalf of organizations, the new certification will follow the model of AFP's successful Certified Treasury Professional TM designation (CTP TM), which has been earned by more than 23,000 people worldwide. As with the CTP TM credential, the new FP&A credential will be based upon a comprehensive, multi-source body of knowledge compiled by top corporate practitioners and updated when necessary. AFP will serve as sponsor and facilitator on behalf of the profession.

The FP&A profession is growing quickly, one of the most sought after areas of expertise by CFOs. Executive recruiter Korn/Ferry International in a recent report noted that within the finance area, "The hottest position today is financial planning and analysis."

Worldwide financial and economic uncertainty makes the FP&A function all the more critical. "If accounting is the interpretation of past events and treasury is optimizing the present, then I like to think of FP&A as preparing a company financially for the future," said Jim Kaitz, AFP's president & CEO.

By standardizing global performance competencies, AFP believes that FP&A professionals who earn the certification will be recognized for their understanding of complex processes, tools and best practices, and therefore well-positioned to drive strategic business decisions at companies, no matter where they are located. In addition to passing a rigorous exam, candidates may be required to meet certain education and experience requirements.

For an in-depth analysis of the FP&A job function, AFP initially convened subject matter experts from Microsoft, AT&T, World Fuel Services, The Cheesecake Factory, Hunter Douglas Fabrication, Convergys Corp. and SPT, Inc., among many other companies. Next, AFP will survey a large, global group of FP&A practitioners about the importance and frequency of the tasks they perform and the specific knowledge and skills they use on the job, finally working with a wide range of practitioners to produce the exam and the ongoing training that FP&A professionals will need in order to perform their jobs competently.

Further details about the credential will be announced at the AFP Annual Conference in Miami this October. FP&A professionals who wish to provide their expertise or participate in the survey phase of the credential's development should contact [FP&A@afponline.org](mailto:FP&A@afponline.org) or visit [www.afponline.org/FPA](http://www.afponline.org/FPA)

#### About AFP®

The Association for Financial Professionals (AFP) serves a network of more than 16,000 members with news, research, treasury certification programs, networking events, financial analytical tools, training, and public policy representation to legislators and regulators. AFP's global reach extends to over 150,000 treasury and financial professionals worldwide, including AFP of Canada; London-based gtnews, an on-line resource for the treasury and finance community; and bobsguide, a financial IT solutions network.

## *AFP Resources*

The legislative update from AFP can be found on the AFP website at the following link:

[http://www.afponline.org/mbr/gr/su/status\\_update.html](http://www.afponline.org/mbr/gr/su/status_update.html)

This week's addition of the AFP Economic Watch providing a brief overview of economic events is at: <http://www.AFPonline.org/econwatch/>