

Thank you for your interest in fiCFO. You will discover unprecedented value by joining this organization of Florida's business leaders. fiCFO members will also benefit from your participation and experience, which will greatly contribute to fiCFO's success, credibility, and sustainability.

As fiCFO is well into our second year, members that have attended as few as two meetings can testify as to the value of their involvement with fiCFO. Members will attest that their relationships with their peers have contributed to better business practices and problem solving. Many members have implemented what they have learned at fiCFO to improve their management teams and apply learned concepts to specific projects and situations. These opportunities were made possible by being a member of an organization that promotes and empowers peer-to-peer connection among leading financial executives.

fiCFO meetings are designed to be efficient and to follow productive formats for education and discussions on topics such as...

- Labor Markets
- Government Policies
- Budgeting
- Executive Compensation & Benefits
- Investment Banking
- Audit Fees
- IPO Markets
- Risk Management & Insurance
- M&A
- The Economy
- Outsourcing
- Employee Salaries & Benefits
- Non-Qualified Executive Benefit Programs
- Commercial Banking
- Team training
- IFRS
- Currency Markets
- AND MORE

Attached is a membership summary for your review followed by a partially completed membership application. Please review, complete, and return the application to me at your convenience.

Please do not hesitate to contact me if you have questions, comments, or recommendations. I can be reached at [kimberly@fiCFO.com](mailto:kimberly@fiCFO.com) or 813-695-1983.

Best regards,



Kimberly Johnson  
Founder | COO & Executive Director  
FL Institute of CFOs (fiCFO)

## **fiCFO MEMBERSHIP SUMMARY**

**fiCFO is Florida's only knowledge-intense, member-driven think tank** for chief financial officers of companies that have annual revenues ranging from \$50 million to over \$22 billion doing business throughout the US and around the world.

**fiCFO's vision** is to provide a secure CFO community peer group that promotes the development of key professional relationships.

**fiCFO's mission** is to promote the development of key professional relationships so that CFOs may learn and grow together, share best practices and experiences, and serve as a sounding board for technical and business matters.

**fiCFO membership** is limited to a select few eligible CFOs and lasts for a period of 12-months starting from the date of the members first meeting attendance after application acceptance.

**fiCFO has two primary types of meetings per year** - fiCFO Speaker Meetings and fiCFO Peer Group Roundtables. As well, fiCFO has other types of meetings and events throughout the year to include complimentary value-add sessions for members presented by fiCFO member companies and sponsors. These sessions address very specific and technical topics as requested by members. Most meetings start early morning and last about 2.5 hours.

**Speaker Meetings** are for fiCFO members, members' guests, fiCFO sponsors, and other eligible CFOs. Speaker Meetings have a keynote presenter that is qualified as a subject matter expert to address member-selected topics in order to enhance CFOs' understanding and insight into specific areas of interest. Speaker Meetings are usually held at professional business clubs.

**Peer Group Roundtables** are for fiCFO members and select eligible CFOs. CFOs in attendance are required to sign a Promise of Confidentiality. The purpose of these informal roundtable meetings is to bring intellectual insight to the examination of issues faced by fiCFO members. Members submit topics for discussion prior to each roundtable. CFOs in attendance must have a strong commitment to sharing of ideas, openness, and confidentiality of all discussions. Peer Group Roundtables are hosted by area CFOs at the hosting CFO's place of business.

### **Membership Benefits:**

- fiCFO enables CFOs to gain fresh perspectives and firsthand knowledge from their peers
- fiCFO assists in professional development that enhances members' value to their companies.
- fiCFO provides the platform for members to explore and implement courses of action with confidence and precision.
- fiCFO provides a respected and secure environment for CFOs to give and share seasoned, confidential advice and expertise
- Members receive priority notices of opportunities, events, and meetings from member companies, sponsors, and partner associations.

### **Membership Process:**

1. Eligible CFOs are invited to apply for membership.
2. After a CFO has been invited to apply for membership, fiCFO's COO/Executive Director will take the necessary steps to secure a brief meeting with the potential member to learn more about them and to share about fiCFO.
3. CFOs that are qualified, invited, and interested in membership then complete the fiCFO Membership Application. There is a \$50.00 membership application processing fee. Payment may be made via credit card or check payable to fiCFO. A credit card authorization form is attached.
4. Potential member's application, biography, and processing fee is then sent to fiCFO via email, fax, or US mail.
  - Email - kimberly@fiCFO.com
  - Fax - 727.499.9573
  - US Mail – fiCFO, Post Office Box 1406, Safety Harbor, FL 34695
5. Upon application acceptance, fiCFO will send the new member their membership invoice and fiCFO's Code of Ethics & Statement of Commitment which is to be signed and returned together with their membership payment.



**fiCFO CREDIT CARD AUTHORIZATION FORM**

I, \_\_\_\_\_, authorize the FL Institute of CFOs (fiCFO) to apply charges to the following credit card for the amount indicated below on the date to charge that is provided.

Date to Charge: \_\_\_\_\_

Total Amount to Charge: \_\_\_\_\_

Purpose for Charge: \_\_\_\_\_

Name Listed on Credit Card: \_\_\_\_\_

Type of Credit Card (Visa, Mastercard, AMEX): \_\_\_\_\_

Credit Card Number: \_\_\_\_\_

Expiration Date: \_\_\_\_\_

Security Code: \_\_\_\_\_

Credit Card Billing Zip Code: \_\_\_\_\_

Card Holder's Signature: \_\_\_\_\_

Print Name: \_\_\_\_\_

Today's Date: \_\_\_\_\_