



THE WOMEN'S FINANCE EXCHANGE

DALLAS TEXAS

November 2010

A LETTER FROM OUR PRESIDENT

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Well, I think Fall has finally arrived! After a never-ending summer, I can hardly believe that it is nearing the holidays – another year has flown by, seemingly in the blink of an eye. I love the holidays as it always seems to bring great opportunities for getting together with family, friends and colleagues at holiday gatherings. As always, WFE will hold its annual holiday party at a member's house for a more intimate, members-only holiday celebration. In keeping with our theme of giving back, this year we'll be collecting gently used cocktail attire for Cinderella's Closet, a non-profit organization that donates prom attire to teens in the D/FW area (based on need). What a great excuse to buy a new holiday dress! And if you haven't joined WFE yet, this is a great time to do so for 2011, as we have a membership special that allows you to join now through the end of 2011 for a reduced membership cost.

Despite the still dreary economic conditions, WFE had another successful year at raising funds for our philanthropy, the Dallas Women's Foundation! After a couple of rain-outs over the last few years, the 9th annual charity golf tournament was rewarded with gorgeous weather, allowing us to raise over \$25,000 for the DWF. I want to thank all of the WFE members and volunteers who came out to make the day a success – we could NOT do this without you. And I want to especially thank our co-chairs, Vicki Farris and Vickie Driver, who put in countless hours planning and organizing this wonderful event. THANK YOU!

In addition to the golf tournament, we've had some other great events this year as well! I thoroughly enjoyed hearing Nancy Berry speak about the differences between all of the generations in the workplace, and Andrea Chapman and Russell Jackson offered an informative overview of the impact of healthcare reform on employers at our August lunch. At our final luncheon of the year, we'll hear about something that seems to make headlines all too often these days – fraud and embezzlement.

Finally, as the year is nearing a close, it is time to elect a new Board of Directors to lead WFE in 2011. The slate of directors will be announced and voted on at the November luncheon, and while I am very sad to have some of our long-time board members "retiring", I am excited about our new board members, who I know will bring new ideas and great energy to our organization. If you are interested in getting more involved in WFE next year, I highly encourage you to visit with a board member about volunteer opportunities. It is generally from these committees that new board members emerge!

For information on all upcoming events, be sure to visit our website at www.wfedallas.org and our blog at www.womensfinanceexchange.blogspot.com.

I look forward to seeing you at one of our upcoming events! Happy Holidays!

Amanda

YOUR QUARTERLY OUTLOOK

Upcoming Calendar

December						
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

December 14th – Holiday Party

January						
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

January 13th – Annual Kickoff

February						
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28					

February 8th – Monthly Luncheon

Our 3rd quarter events included a fantastic networking happy hour in July, when we partner with the women of several other local financial and related organizations to expand our networks. In August, we returned to the Belo for our scheduled luncheon where we heard from Andrea Jackson & Russell Chapman on the timely topic of healthcare reform and its impact to employers. In September, we were lucky enough to schedule our annual charity golf tournament on the most beautiful day of the year! As mentioned in the enclosed article, we raised \$27,000 for our philanthropy, the Dallas Women's Foundation who grants funds to local organizations benefitting women and girls in the Dallas/Fort Worth community. To read more about the great programs that are funded by the Dallas Women's Foundation, please visit www.dallaswomensfoundation.org.

WFE has wrapped up our scheduled programming at the Belo with two great luncheon events. In October, we heard from Nancy Barry on the differences between the generations in the workplace and some entertaining and insightful observations of the youngest generation now entering the workforce. For more information on Nancy, her book and speaking engagements, please visit Nancy's website at www.nancybarry.com.

And we concluded our programming for the year with a highly educational presentation from Angela Morelock of BKD on Internal Fraud and Embezzlement. In the era of notorious crooks like Bernie Madoff, internal fraud and embezzlement schemes are alive and flourishing...and apparently most often perpetrated by the least suspicious and longest-tenured employees! If you would like a copy of Angela's slide presentation, please let us know!

Please join us **Tuesday, December 14th** for our Annual Holiday Party at Jeanette Bankston's house for wonderful hors d'oeuvres, wine and conversation! We'll be collecting gently used cocktail attire for Cinderella's Closet. You won't want to miss it! RSVP at www.wfedallas.org.

And mark your calendar for **Thursday, January 13th**, when we'll ring in 2011 with our fabulous Kickoff Party! More details coming soon....be sure to check the website for regular updates!

THANK YOU TO OUR 2010 CORPORATE SPONSORS!

Our corporate sponsors provide a budget for WFE to expand its programming and networking resources. Without the generous support of our sponsors, we would not be able to bring in such quality speakers or provide such fabulous events at such an affordable cost to our members. For that, we are eternally grateful.

We ask that you please show your continued support for these organizations in appreciation of their support of WFE!



We are actively seeking corporate sponsors for 2011. As a reminder, Corporate Sponsor spots are limited to 2 per industry. To find out about our Corporate Sponsorship program, please contact the Communications Committee or visit our website at www.wfedallas.org.



9TH ANNUAL WOMEN'S FINANCE EXCHANGE CHARITY GOLF TOURNAMENT



Every year, WFE puts on a charity golf tournament benefitting the Dallas Women's Foundation. This year, given the significant economic turmoil, particularly in the financial services sector, WFE was very concerned in our ability to raise historical levels of support for the tournament. However, with the wonderful help of all of our sponsors, volunteers, golfers, and most importantly – the Golf Tournament Co-Chairs, Vicki Farris & Vickie Driver and their committee, WFE was proud to contribute \$27,000 to the Dallas Women's Foundation.

After a couple of rain-outs over the past couple of years, we were rewarded with beautiful weather and a near sell-out field of golfers. In addition to great goody-bags, there was a new car hole-in-one prize (sadly not won), longest drive and closest to the pin contests for additional fun on the course, and a wonderful array of raffle prizes were awarded at dinner following the tournament.

We would like to say another huge **Thank You** to all of our generous sponsors who have supported us over the year and helped us make this year a resounding success!

THANK YOU SPONSORS!!!



Women's Finance Exchange
9th Annual
Charity Golf Tournament



LOCKE LORD BISSELL & LIDDELL LLP



MESSETT FINANCIAL



Coffin & Driver PLLC
Attorneys at Law

Dallas Bar Association
Bankruptcy & Commercial Law Section



HERITAGE DENTAL GROUP OF ROCKWALL
DR. CHERYL NICOLI

Vinson & Elkins

Here are some pictures from the beautiful day!



Brandy, Jamie & Jessica manning the lunch station! Carts, Carts & More Carts, loaded for the day!



Fabulous volunteers Anne Capps & Jen Elder!



WFE's cart girls – Jennifer & Andrea!

Thank you to all of our wonderful volunteers – we repeatedly hear from the guys what a great tournament we put on, and it is only through the awesome power of our members and volunteers that we are able to accomplish what we do – so thank you. And be proud and amazed at what we can do together...

Women Helping Women

The 9th Annual WFE golf tournament raised \$27,000 for the Dallas Women's Foundation!!!

(not to mention during one of the most pronounced recessions in US history)

MEET A MEMBER!

Rachel Patterson is from Rowlett, Texas and attended the University of Texas at Austin. She graduated with a degree in Finance in 2007 and was recruited and hired by Bank of Texas to complete their formal credit training program in Tulsa, Oklahoma. At the conclusion of her training, Rachel returned to Dallas where she completed a series of rotations through different operations of the Bank; including Real Estate, Energy, Corporate Banking, Business Banking and Special Assets. Rachel was hired as an analyst into the Healthcare Banking Group in late 2008 and was recently promoted to Banking Officer in October of 2010.

Rachel joined WFE in 2008 and is also involved with the Young Professionals of The Dallas Regional Chamber. She is the President of the YP Toastmasters Club, and was recently appointed to the YP Board for 2011.

What are your hobbies and interests? I enjoy playing tennis and running when the weather is nice. I love spending time with my family in Rowlett, going to concerts, and I also love to travel. My favorite weekend activity is to see live music and my favorite food is seafood. I will never turn down sushi and I could probably eat sushi for dinner every night.

What are your favorite sports? I am a huge UT College Football fan! This season has been tough for my Longhorns, but I absolutely love watching them play; win or lose. I try to make it back to Austin for at least one home game every year. I am also a Dallas Mavericks fan and I really enjoy a good Mavs game.

What are your favorite books and movies? My favorite books are *The Good Earth*, by Pearl S. Buck, 1984 by George Orwell, and *Outliers* by Malcolm Gladwell. My favorite movies are *The Boondock Saints*, *Pulp Fiction*, *Reservoir Dogs* and *Little Miss Sunshine*.

What would you like to share about your family?

My family lives in Rowlett, and I spend quite a bit of time with them. I have a 17-year old sister that just graduated from Rowlett High School, and I am currently helping her explore different college opportunities. She loves the arts and wants to be a graphic design major.



The 2010 Annual Member Holiday Party!



December 14th

5:30pm

Jeanette Bankston's House

13210 Hughes Lane

Dallas, Texas

Don't forget to bring your gently used cocktail attire for Cinderella's Closet!

MEMBER NEWS



Vickie Driver started her own law firm and is now part of Coffin & Driver, PLLC. Congratulations Vickie!

Laura Dees has joined the accounting firm of BKM Sowan Horan as their senior audit manager. Congratulations Laura!

Jennifer Zuniga had a baby girl, Lily Isabel on August 31st. Lily weighed 6 lbs and 5 oz and was 18.5 inches long. Congratulations Jennifer!

Susan Newbold accepted a position as a small business lender with Bank of America. Congratulations Susan!

Jeanne St. John accepted a position with Prudential Mortgage Capital as an asset manager. Congratulations Jeanne!

Amanda Cone is a Vice President at F&M Bank. Congratulations Amanda!



If you have news you would like to share with us, please let the communications board members know. Thank you!



HAPPY HOLIDAYS FROM THE WOMEN'S FINANCE EXCHANGE!

ANNOUNCEMENT

Check out our website at
www.wfedallas.org

And our NEW blog at
womensfinanceexchange.blogspot.com

WFE's 2011 Individual Membership Options

Rollover Membership - \$175

Available from Nov 1st through 2011. Sign up now to attend the holiday party and get member pricing on all events prior to 2011!

Early Bird Special Rate - \$150

Available from November 1st - February 28th
Discount from regular \$175 member price!

WFE Group Membership Options

Corporate Sponsorships - \$1,500

Includes 4 Paid Membership
Signage at all Lunches
Recognition in Quarterly Newsletter

Buy 3, Get 1 Free

For corporations with several members, we offer a group discount. Please contact membership for further details.