



2020 - 2021 Officers and Board

President

Julie Gieber, CBF
OrePac Building Products
503.685.5475

Vice President

Alaina Worden, CBF
Carson Oil
503-471-4362

Secretary

Eleanor Hartman, CBA
Autodesk Inc
971.238.5407

Treasurer

Debora Diamond-Burt, CCE, CICP
Schnitzer Steel Industries, Inc.
503.721.5660

1-Year Directors

Melissa Garcia, CBF
Bridgewell Resources LLC
503.872.3423

Barbara Davis, CCE
Northwest Pump
(503) 205-2137

2-Year Directors

Bill Heintz, CCE
Bridgewell Resources, LLC

Brett Hanft, CBA
American Int'l Forest Prod LLC
503.520.5451

Chairman of the Board

Teresa Silva CPA, CCE
Simple Sums Accounting PLLC
971.388.6016

National CFDD Area Director— Oregon

Kelly Shock, CCRA, CCE
Continental Resources Inc
303-704-3987

CFDD Liaison

Clara Nemeth, CCE, CGA
NACM Commercial Services
971.230.1144

**"Challenge Yourself—
Thrive to be the best you can be!"**

The Creditline

October 2020

ZOOM VIRTUAL MEETING

Legislative Update - Virus and budgets and fires, oh my....

October 8, 2020

Meeting Location: Virtual!

Meeting is from 4:30 – 5:30 p.m.

Cost: \$20

You are invited to join our scheduled Zoom meeting.

To Join Zoom Meeting:

<https://us02web.zoom.us/j/4620348230?pwd=ZE5URkYvaVZ0Q3FVcFFyNEtoU0szUT09>

Meeting ID: 462 034 8230

Password: education

We will do a quick business meeting and then start our educational portion with Cindy Robert of Rainmakers Government Strategies.

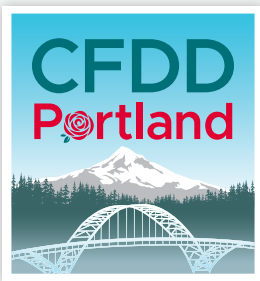
Professional Networking to follow questions and answers portion of his presentation

Program: Legislative Update - Virus and budgets and fires, oh my....

Description: COVID and resulting business closures, tenant protections, school adaptations have impacted Oregon's budget. Then fires came and caused more angst about state coffers and public policy misses. Discuss what is going on in Oregon government and how your business and your employees will be impacted.

Presenter: Cindy Ziel Robert is with Rainmakers Government Strategies. Cindy has been working in the Oregon public policy arena for almost three decades, with clients ranging from local governments to Fortune 500 businesses to non-profits. Her work has included all aspects of government relations, legislative and communication strategies, campaign advising, organizational development and PAC management. Cindy's lobbying experience includes influencing Oregon public policy makers, whether local officials, agency directors, licensing boards, legislators or grassroots activists. Cindy is a Willamette University Graduate who also studied at American University in Washington, D.C.

Please RSVP for Billing Purposes to Ashlee.minty@nwnatural.com.



The Creditline

October 2020



October Raffle

We will have a basket to raffle off at our October meeting (via Zoom).

Tickets \$10

Proceeds benefit the CFDD Portland Chapter Scholarship Fund.

Basket will be delivered or mailed to winner.

We are looking for donations around the theme of

"Pick your Boo"

Suggestions include Halloween decorations, candy & treats, décor, spider webbing, plastic cauldron, seasonal beer/wine, scary movies, etc.

Please contact Alaina Worden
alaina.worden@carsonteam.com if you have items to donate or have questions.

Next Month

**"Autumn is upon us"
Donations still needed**



Member Birthdays - October

Kathy Hamilton CCE
Clara Nemeth CCE, CGA
Bill Heintz CCE
Mark Teeter CCE, CICP

October 3
October 8
October 12
October 28



Dollars for Scholars

Dollars for Scholars is just one of our scholarship opportunities available to the CFDD Portland Membership. Members can accrue scholarship "dollars" by attending the monthly chapter meetings, or serving on a committee or the chapter board of directors. The accrued dollars can be used toward testing fees, educational offerings, and conference related expenses.

To find out your current dollars for scholars points, you can contact the scholarship chair Barbara Davis, CCE at Barbara.davis@nwpump.com



The Creditline

October 2020

President's Message

Hello Portland CFDD Chapter Members!!

Ready or not Fall is here! During this pandemic, Fall is just not the same, I will miss the college football games to go to or watch! We will all need to focus on the things we can do! I love the beautiful colors of fall as well as the cozy fires, warm drinks and sweaters that go with it!



Our meeting for September "Happy Hour Virtual Social" was cancelled due to the wild fires last month. I personally that day was at Level 2 evacuation. We are gearing up for a wonderful educational presentation for the October meeting! Please RSVP for our Zoom presentation for October 8th meeting beginning at 4:30pm – It will be a very enlightening and educational Legislative Update presented by Cindy Robert. Cindy is with Rainmakers Government Strategies and she has been working in the Oregon public policy arena for almost three decades.

Due to unforeseen circumstances, the presentation of the Outstanding New Member (ONM) will be presented at the November Zoom meeting. We did not receive any nominations and will not present a Distinguished Member Award this year.

The CFDD Portland Chapter is proud to partner with our NACM affiliate by sponsoring a live educational program on Thursday, November 12th as part of this year's virtual NACM Commercial Services Western Conference!! Many scholarships are being offered through the NACM CS Foundation to cover the registration for the conference. Please take advantage of this outstanding educational offering and make sure you join us on November 12th, which coincides with our monthly Chapter education meeting.

The CFDD National Newsletter will be distributed at the end of October. If you have articles of interest that are relevant to you in your job, please consider sharing them with the CFDD Membership. For anyone who is working on their certifications (hint), writing an article for publication in the CFDD National newsletter will earn you points on your Roadmap! Please submit to chrisb@pioneerballoon.com by October 2nd if interested.

I look forward to "seeing" everyone on our Zoom meeting and reconnecting as it feels it has been a very long time with all that has gone on in our area in recent weeks.

Stay safe, enjoy the beauty of Fall and see you at the October meeting!

Sincerely,

Julie Gieber,
CFDD Portland Chapter President



The Creditline

October 2020

CFDD National Scholarship Offering...

CFDD Portland Chapter Members -

With Credit Conferences being postponed or converted to a virtual format this year, your CFDD National Board has taken steps to revise and modify CFDD National Scholarship offerings for the membership. Since the NACM Credit Congress 'early bird' registration date typically occurs in early December, a new scholarship offering will begin immediately – with a scholarship application deadline of October 31, 2020. This timing fits much more in line with members who are planning to attend the NACM Credit Congress event next year in Kansas City. Be on the lookout for much more information coming out to CFDD members early in October.



Additionally, mark your calendars for September 9 – 10, 2021 when the CFDD National Conference will be held in Oklahoma City, OK at the Sheraton – Downtown.

Your CFDD National Board remains diligent in maintaining and promoting education, leadership development, networking, mentoring and an overall ability for you to continue your personal and professional growth in the credit and finance profession.

Please stay safe and healthy through these challenging times.

Brett Hanft, CBA
American Int'l Forest Prod LLC



The Creditline

October 2020

August Treasurer's Report

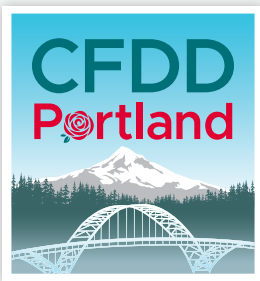
Total beginning balance of Restricted and Unrestricted Funds	8,938.31
Unrestricted Funds	
Beginning balance as of JULY 1, 2020	2,594.05
Income	130.04
Expenses	(5.00)
Ending balance as of JULY 31, 2020	2,719.09
Restricted Funds	
Beginning balance as of JULY 1, 2020	6,344.26
Income	
Expenses	
Ending balance as of JULY 31, 2020	6,344.26
Total ending balance of Restricted and Unrestricted Funds	9,063.35
Breakdown of Accounts	
Unitus 1 Share Deposit	5.02
Checking Account Balance	4,874.74
Outstanding Checks/Deposit	
Money Market Account Balance	4,183.59
Ending balance as of JULY 31, 2020	9,063.35

CFDD Vision Statement—

"The mission of the NACM Credit and Financial Development Division is to develop tomorrow's business leaders through core offerings."

CFDD Mission Statement—

"To be a leading provider of professional development opportunities through learning, coaching, networking, and individual enrichment."



The Creditline

October 2020

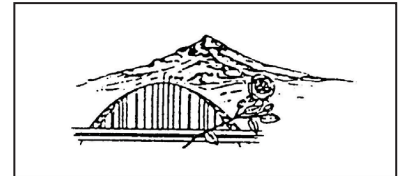


CFDD - PORTLAND CHAPTER
MONTHLY EDUCATIONAL MEETING

ZOOM VIRTUAL

August 13th, 2020

4:30 pm



AGENDA

GOALS OF THE MEETING:

To review, discuss and plan activities that promote professional growth, education, business contacts, and friendships within the CFDD Portland Chapter and the Credit/Finance Community.

❖ **CALL TO ORDER:** 4:35 -Julie Gieber, CBF

❖ **INTRODUCTIONS**

Past Presidents & Special Guests in attendance

- **Past Presidents:** Brett Hanft, CBA; Yvonne Prinslow CCE; Barbara Davis CCE; Debora Diamond-Burt CCE, CICP; Teresa Silva, CPA, CCE,
- **NACM CS Board Members:** Eve Sahnaw, CCE, Director; Mark Teeter, CCE, CICP, Director; Jennifer Walsh; CEO
- **NACM CS Foundation Board Members:** Teresa Silva, CPA, CCE, Treasurer; Brett Hanft, CBA, Director; Alaina Worden, CBF, Director; Eleanor Hartman, CBA, Director
- **CFDD National Board:** Brett Hanft CBA, Immediate Past Chairman of the Board; Yvonne Prinslow, CCE, Area Director; Debora Diamond-Burt, CCE, CICP, Area Director; Kelly Shock, CCE, CCRA
- **NACM/CFDD Liaison:** Clara Nemeth, CCE NACM Commercial Services

❖ **Special Guest & Speaker:** Round Table – Jeff Butterfield CCE, Brett Hanft CBA, Eleanor Hartman, CBA, Ashlee Minty CBA, Debora Diamond-Burt CCE CICP

BUSINESS:

- Approval of the July 11th, 2020 Meeting Minutes
 - Motion with corrections of Barbara Davis, CCE not attendance, Julie Gieber, CBF not in attendance – Brett, Hanft, CBF; Second Debora Dimond-Burt, CCE, CICP

REPORTS OF OFFICERS, BOARD AND STANDING COMMITTEES: (0-5 minutes)

- Treasurer's Report - Ashlee Minty, CBA
 - Only change on the report was for the July raffle \$130, checks \$80 still need to be deposited this month
- Monthly Program - Ashlee Minty, CBA
 - Ashlee to send an invite for an educational planning meeting. Thinking about topics, ideas and send to her your ideas
- Membership - Julie Gieber, CBF
 - Holding study at 57



The Creditline

October 2020

CFDD Portland Chapter Monthly Educational Meeting Minutes (Continued)

- Scholarships - Barbara Davis, CCE
 - Nothing new to report. Dollars for scholars are good to use for certifications
- Fundraising - Alaina Worden, CBF
 - Tonight's basket "Wine Party Picnic – 3 bottles of special label Rose Festival wines, Oak Knoll gift certificate for wine tasting, cheese board, wine glasses, & chocolate. Tickets are \$10. Watch for email with details to be sent at the end of the meeting. Next month is themed "End of Summer BBQ", October "Pick your Boo"
- CFDD National - Kelly Shock, CCE, CCRA – not present
 - Julie Gieber, CBF shared CFDD National is postponed until 2021. – 2020 Scholarships will be carried over to the 2021 meeting

BUSINESS MEETING: (0 - 5 minutes)

- Installations? August meeting? - Did not discuss in the meeting but Board agreed to not conduct Installations this year and the In-coming Board will just step into their roles
- Audit Committee needs a date to approve and transfer files
- Educational Planning meeting – Email your ideas to Ashlee Minty, CBA for educational meeting topics

ANNOUNCEMENTS: (0 - 5 minutes)

CFDD National, Still planned for September 10-11, 2020 in Oklahoma City, OK
\$ for Scholars – See Barbara Davis for balances.

Creditline Deadlines

<u>Submit by:</u>	<u>For the Issue:</u>	<u>Submit by:</u>	<u>For the Issue:</u>
August 20	September	Sept 20	October

RAFFLE

PROGRAM: Credit Manager's Survival of COVID-19.

Description: This month's meeting will be a roundtable panel discussion regarding credit management during the COVID-19 pandemic. We will have speakers from different industries including, lumber, steel, utilities and more. They will discuss the impacts of the pandemic on their organizations and strategies for collecting payment during this difficult time. The session will end with a sharing of best practices and an open discussion.

Panel:

Jeff Butterfield, CCE- Branch Credit Manager at Pacific Seafood. Pacific Seafood is a vertically integrated center of the plate protein supplier, including seafood, beef, chicken and pork items.



The Creditline

October 2020

CFDD Portland Chapter Monthly Educational Meeting Minutes (Continued)

Brett Hanft, CBA- Credit Manager at American International Forest Products, LLC. American International Forest Products is a wholesale lumber distributor.

Eleanor Hartman, CBA-Senior Credit Team Lead at Autodesk, Inc. Autodesk Inc. is a software company.

Ashlee Minty, CBA- Director of Credit at NW Natural Gas. NW Natural gas is our local gas utility company that serves Oregon and SW Washington.

Debora Diamond-Burt, CCE, CICP-Corporate Credit Manager at Schnitzer Steel Industries, Inc. Schnitzer Steel Industries, Inc is a global leader in the metals recycling industry.

Feel free to have a cocktail while we meet! Kind of a virtual happy hour!

ADJOURNMENT – 5:56PM



The Creditline



CFDD Portland Chapter Application for Scholarship Award

1. Which scholarship are you applying for? _____
2. Please consider my application for a scholarship toward: _____
3. How long have you been a member of CFDD? _____
4. Please list the number of meetings attended in the last twelve months: _____
5. Current position with firm: _____
6. Will your company support you financially to attend this class? ☐ Yes ☐ No ☐ Partially
7. Are you working towards certification or recertification? ☐ Yes ☐ No
8. What interests you in this class/conference? _____
9. Briefly, outline your past and current participation in CFDD: (Please complete on back if needed.)
 - a. Offices held _____
Dates to/from: _____
 - b. Committees served _____
Dates to/from: _____
10. Have you previously applied for a scholarship? If so, when and which one? _____
11. Have you been awarded a scholarship within the past 12 months from CFDD Portland Chapter? ☐ Yes ☐ No
Which one(s) _____
12. Have you previously attended the CFDD National Conference or National Credit Congress?

CFDD National Conference—Year(s) attended: _____

National Credit Congress—Year(s) attended: _____

I understand that if I am selected for a scholarship, I must submit a written report to the Scholarship Committee within three weeks of completion of the class or seminar. At my option, I may make an oral report to the membership in place of the written report.

Member Name: _____ Company Name: _____

Supervisor Name: _____ Supervisor Email: _____

Mailing Address: _____

City, State, Zip: _____

Phone: _____ Fax: _____

Email Address: _____

Signature: _____ Date: _____

12. Mail, fax, or email to: Barbara Davis, CCE
Northwest Pump & Equipment
2800 NW 31st Ave., Portland, Oregon 97210-1720
p: 503.227.7867 f: 503.227.4430
e: barbara.davis@nwpump.com



The Creditline

CFDD Portland Chapter Membership Application

Please type or print

I hereby make application for membership in the National Association of Credit Management, Credit Financial Development Division, Portland Oregon Chapter.

Company Data

Name: _____ Title: _____

Email: _____

Company: _____

Phone: _____ Fax: _____

Address (Mailing): _____

City/State/Zip: _____

Physical: _____

City/State/Zip: _____

NACM Affiliate/CRF which your firm belongs to: _____ Member # _____

How/where did you hear about CFDD? _____

Personal Data

Address: _____

Phone#: _____ Birth month & date: _____

Annual dues are billed the end of October each year and the membership year is January 1 through December 31. Dues are \$110 per year and are prorated on the basis of \$9.17 per month.

Please bill my firm on the next NACM Commercial Services statement \$ _____

Applicant's signature _____

Date: _____

Please send the completed form to the following address:

Yvonne Prinslow, CCE
Hampton Lumber Sales
9600 SW Barnes Rd. #200
Portland, OR 97225
p: 503.203.6495 f: 503.291.5653
e: YvonnePrinslow@HamptonLumber.com