



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

January 2021

ZOOM VIRTUAL MEETING

Keys to Maximizing Your Effectiveness

January 14, 2021

Meeting Location: Virtual!

Meeting is from 4:30 – 6:00 p.m.

Cost: \$20

You are invited to join our scheduled Zoom meeting.

To Join Zoom Meeting:

<https://us02web.zoom.us/j/4620348230?pwd=WkhZM1I3OHdrUDJKL0VlVm5qWWU1UT09>

Meeting ID: 462 034 8230

Password: EDUCATION

Program: Keys to Maximizing Your Effectiveness

Description: *We all desire to be more effective and successful at work and in our personal lives. In this presentation we will learn tried and proven methods to be more effective as leaders, workers and individuals – and learn how to help others be more effective too! Come and learn tips to improve the communication, relationships and performance of you and your team. We'll be pulling wisdom from the bestselling business book of all-time (Dr. Covey's "Seven Habits of Highly Effective People") and from other leading-edge research and writings.*

Presenter: Wes Friesen, President - Solomon Training & Development; University Instructor - George Fox University; Manager: Billing, Credit & Payments - Portland General Electric (retired); Operations Manager – Grace Pointe Church

Wes Friesen (MBA, CCE, CBF, CBA EMCM, CMDSM, MCOM, MDC, ICP, CMA, CFM, CM, APP, PHR, CTP, OSPC) is a proven leader and developer of individuals and high performing and award-winning teams. Wes managed at Portland general Electric for 37 years and sits on multiple non-profit boards. He is also an award-winning University Instructor and Conference Speaker—and is the President of Solomon Training and Development, which provides leadership, management and team building training.

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



The Creditline

January 2021



January's Raffle

We will have a basket to raffle off at our January 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
"A New Year"

Suggestions include wine glasses, wine, wine cork, gift card, throw blanket, chocolates, etc.

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

Next Month

"Love is in the Air"
Donations still needed

Thank you to all participants in December's raffle, we raised \$575



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



January Birthdays

Wallace Grissette	January 4
Diane Lucht	January 7
Eve Sahnaw, CCE	January 10
Dennis Corey	January 11



The Creditline

January 2021

President's Message

Hello Portland Chapter Members!

Happy New Year!! We made it through one of the most interesting, difficult and educational years on record. As we work from home or from 6 feet apart, we need to be grateful for our CFDD Family and help each other through these unprecedented times.

Thank you to our Holiday Party Committee (Alaina Worden, Kimberly Jones, Eleanor Hartman and Melanie Etzel) for putting on the Virtual Christmas Party in December! It was a lot of fun and we raised \$575.00 for future scholarships! Thank you also for all who participated in the raffles and who donated for the Wine Wall/baskets to help make this fundraiser a success!

Please register for the many educational opportunities through NACM. There is a variety of scholarships including Dollars for Scholars available for conferences, certifications and online classes! The scholarships are abundant through NACM National, CFDD local and National. See Barbara Davis for more information on what is available. Education is Power!

Have a safe and healthy rest of your holiday season! I hope to see all of you at the January 14th Zoom meeting where Wes Friesen, will be presenting on Keys to Maximizing Your Effectiveness at 4:30!

Happy New Year!

Julie Gieber,
CFDD Portland Chapter President





The Creditline

January 2021

2021 Credit Congress Scholarship Available!

CFDD Portland Chapter is pleased to announce that we are offering one scholarship for early bird registration to the 2021 Credit Congress! This will apply to registration for the in-person Congress in Kansas City or the virtual Congress option.

Scholarship applications are available in the Creditline. Please forward your applications to Barbara.davis@nwpump.com. The due date for the applications is January 11, 2021.

Announcing the "Viv" The Vivian J. Barwell, CBF CFDD Service Award

In 2009 the CFDD-Portland Chapter Board of Directors established an award that would honor the memory of Vivian J. Barwell, CBF, by recognizing an individual for their service, dedication and loyalty to the CFDD-Portland Chapter.

Vivian J. Barwell, CBF, was a long-time devoted member, leader, mentor, teacher and unconditional friend to all those associated with the CFDD-Portland Chapter.

Vivian was Credit Manager for Darigold, Inc. (now Land O'Lakes) for many years and was CFDD-Portland Chapter President in 1976-77. She was recognized with the Chapter's Distinguished Member Award in 1982. Vivian was Chairman of the NACM Oregon Board of Directors in 1993-94.

Her outstanding service, dedication and loyalty to the credit profession had a profound and lasting influence on all who were acquainted with her both personally and professionally. The "Viv" Award honors this outstanding lady's many contributions and her lasting memory.

Nominations for the 2021 VIV Award will be open from January 1 through February 15, 2021. A nomination form is included in this issue of the Creditline to formally nominate an individual that you feel has gone "above and beyond" during their tenure with the Chapter in the areas of service, dedication and loyalty.

The 2021 Vivian J. Barwell, CBF, CFDD Service Award Committee

Yvonne Prinslow, CCE Hampton Lumber
Brett Hanft, CBA American International Forest Products LLC

The "Viv"

The Vivian J. Barwell, CBF, CFDD Service Award

The "Viv" is named in honor of Vivian J. Barwell, CBF, and is awarded to an individual Member for their outstanding service, dedication and loyalty to the CFDD-Portland Chapter.

Ideals - Viv was a long-time devoted CFDD member, leader, mentor, teacher and unconditional friend to all who knew her. Her contributions, dedication and loyalty to the credit profession had a profound influence on all she touched. This Award honors her memory.

Nominations may be made by any active CFDD-Portland Chapter Member and are accepted from January 1 through February 15. The Award honoree is announced at the CFDD-Portland Chapter Annual Meeting in March.

Criteria - The Nominee must be an active CFDD-Portland Chapter Member and have been a CFDD-Portland Chapter Member for no less than five years. **Qualities** reflected in Nominee include **Outstanding Service** – level of participation in education meetings, conferences, seminars, etc., **Outstanding Dedication** – Teaching, mentoring, leadership and committee activity, etc., **Outstanding Loyalty** – Years of service and support of the Mission and Vision Statements of CFDD.

NOMINATION FORM

I wish to nominate:

Name _____ Firm _____ Title _____

Address _____ Telephone _____

Years in Chapter _____ (5 yrs Min.) Service as Officer/Director/Committees: _____

Describe *Qualities of Outstanding Service* this individual has provided to the Chapter: _____

Describe *Qualities of Outstanding Dedication* this individual has provided to the Chapter: _____

Describe *Qualities of Outstanding Loyalty* this individual has provided to the Chapter: _____

Additional Comments _____

Please feel free to attach additional sheets as necessary in support of this nomination to include service to the CFDD-Portland Chapter and its members that attests to the nominee's dedication, character and integrity.

Nominated by _____ Telephone _____ Date _____

Please forward the completed application so that it is *received by no later than February 15* to:

VIV Review Committee, c/o Yvonne Prinslow, CCE, Hampton Lumber 9600 SW Barnes Road Portland, OR 97225 or you may Fax to 503-291-5653 or email Yvonneprinslow@hamptonlumber.com. Any questions call Yvonne at 503-203-6495.



The Creditline

January 2021

November Treasurer's Report

Total beginning balance of Restricted and Unrestricted Funds	9,718.46
Unrestricted Funds	
Beginning balance as of November 1, 2020	3,374.20
Income	180.03
Expenses	(5.00)
Ending balance as of November 30, 2020	3,549.23
Restricted Funds	
Beginning balance as of November 1, 2020	6,344.26
Income	
Expenses	
Ending balance as of November 30, 2020	6,344.26
Total ending balance of Restricted and Unrestricted Funds	9,893.49
Breakdown of Accounts	
Unitus 1 Share Deposit	5.02
Checking Account Balance	5,724.74
Outstanding Checks/Deposit -	
Money Market Account Balance	4,163.73
Ending balance as of November 30, 2020	9,893.49

CFDD Vision Statement—

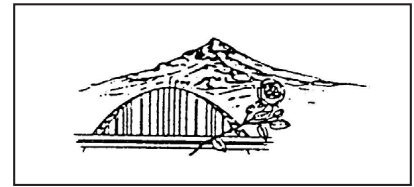
"The mission of the NACM Credit and Financial Development Division is to develop tomorrow's business leaders through core offerings."

CFDD Mission Statement—

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



CFDD - PORTLAND CHAPTER
MONTHLY EDUCATIONAL MEETING
ZOOM VIRTUAL
December 10th, 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:** -Julie Gieber, CBF at 4:39pm

- ❖ **INTRODUCTIONS** **Past Presidents & Special Guests in attendance**
 - **Past Presidents:** 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;
 - **NACM CS Foundation Board Members:** Alaina Worden, CBF, Director; Eleanor Hartman, CBA, Director
 - **CFDD National 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

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

- Treasurer's Report - Julie Gieber, CBF stated last month we increased by \$180.00
- Monthly Program - Alaina Worden, CBF reported January's Program will be presented by Wes Friesen, March will be Anti-Trust with Jack Cooper.
- Membership - Yvonne Prinslow, CCE reported that membership is at 55.
- Scholarships - Barbara Davis, CCE. Please see Barbara for your totals on Dollars for Scholars to use on any educational
- Fundraising - Alaina Worden, CBF, Wine wall and Christmas basket for the raffle today!
- CFDD National - Kelly Shock, CCE, CCRA – Please use scholarships and register for the CFDD National in Oklahoma City, OK in Sept. 2021!

BUSINESS MEETING: (0 - 5 minutes)

- Approval of the November 12th, 2020 Meeting Minutes
- Membership Annual report is due on 1/10/2021.

PROGRAM: Holiday Party, games and social time!

RAFFLE & WINE WALL

ANNOUNCEMENTS: (0 - 5 minutes)

CFDD National, Postponed til Sept. 2021 in Oklahoma City, OK

Creditline Deadlines

<u>Submit by:</u>	<u>For the Issue:</u>	<u>Submit by:</u>	<u>For the Issue:</u>
Dec 20	January	Jan 20	February

ADJOURNMENT – 5:30 PM



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 : _____ 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