



## 2022 - 2023 Officers and Board

### President

Alaina Worden, CCE  
Carson  
503.471.4362

### Vice President

Eleanor Hartman, CCE  
Autodesk Inc  
971.238.5407

### Secretary

Melissa Garcia, CBF  
Bridgewell Resources LLC  
503.872.3423

### Treasurer

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

### 1-Year Directors

Bill Heintz, CCE  
Bridgewell Resources, LLC  
503.522.7107

Melanie Etzel, CCE  
Cascade Nut & Bolt  
503-485-1748

### 2-Year Directors

Kimberly Jones  
Carson  
503.471.4311

Julie McNurney, CBF  
OrePac Building Products  
503.685.5475

### Co-Chairs of the Board

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

Barbara Davis, CCE  
Northwest Pump  
503.205.2137

### National CFDD Area Director— Oregon

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

### CFDD Liaison

Clara Nemeth, CCE, CGA  
NACM Commercial Services  
971.230.1144

# The Creditline

March 2023

## ZOOM VIRTUAL MEETING

**March 9, 2023**

**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:

Change Management – Practical Applications

### Description:

Change Management and how it is in use in the Autodesk Credit Department.

### Presenter:

**Jeffrey Snipes , CICP**

**Senior Manager – Customer Financial Services**

Jeffrey is a seasoned credit professional with nearly 25 years of experience in the credit and collections field. Jeffrey spent 2 years in consumer collections with Nationwide Credit before going to work for Robert Half International in their Boston Field Service Center, working with B2B accounts. After spending just over 3 years there, he and his wife had their first daughter. Needing to be closer to his New Hampshire home, he accepted a job at Autodesk where he has been for the past 18 years. After starting out as a Credit Analyst overseeing a portfolio of about \$20M a year, he excelled and progressed through the ranks, becoming Senior Manager - Customer Financial Services. Jeffrey manages a remote team of 13 employees spread across the US, Ireland and Colombia that are divided into 2 focuses: a nine-member Credit and Collections team responsible for over \$2B of cash annually; and a four-member project team dedicated to our ongoing back office and sales platform transformation.



# The Creditline

March 2023



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

Tickets \$10

Proceeds benefit the CFDD Portland Chapter Scholarship Fund.

We are looking for donations around the theme of

*Let the Shenanigans Begin - St. Patrick's Day*

Suggestions include all things, St. Patrick's Day Candy, cookies \$2 bills, beer/wine, Growler, lottery tickets, holiday décor, etc.

Please contact Alaina Worden [alaina.worden@carsonteam.com](mailto:alaina.worden@carsonteam.com) if you have items to donate or have questions.

Next Month Raffle



**Thank you** to all participated in the February raffle, together we raised \$170 for future scholarships.



## 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.

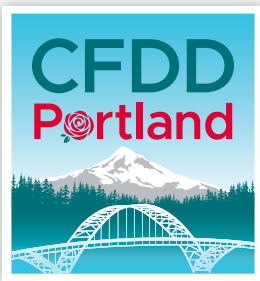
To find out your current dollars for scholars points, you can contact the scholarship chair Barbara Davis, CCE at [Barbara.davis@nwpump.com](mailto:Barbara.davis@nwpump.com)



## March Birthdays

Alaina Worden, CBA  
Vanessa Smith

March 20  
March 22



# The Creditline

March 2023

## President's Message

February's educational session was incredible. Jake Hillemeier walked the group through Emotional Intelligence. An excellent topic and so much information shared. In March Jeffrey Snipes will be speaking on Change Management, another excellent topic. We hope to see you on March 9th @ 4:30pm PST.

Last month the 2023 Nominating Committee met and has recommended the following slate of Board members who have agreed to serve our chapter membership in the new term. The membership will vote on this proposed nomination list at our March chapter meeting, followed by the installation of the new board in May. Thank you to our 2023 Nominating Committee for their dedication to serve on this important committee.



<b>President</b>	Alaina Worden, CCE, Carson
<b>Vice-President</b>	Eleanor Hartman, CCE Autodesk Inc
<b>Secretary</b>	Melissa Garcia, CBF, Bridgewell Resources LLC
<b>Treasurer</b>	Debora Diamond-Burt, CCE, CICP, Schnitzer Steel Industries, Inc
<b>1-year Director</b>	Kimberly Jones, CBA, Carson
<b>1-year Director</b>	Melanie Etzel, CCE, Cascade Nut & Bolt
<b>2-year Director</b>	Sylvia Schultz, Carson
<b>2-year Director</b>	Bill Heintz, CCE, Bridgewell Resources LLC
<b>Chairman of the Board</b>	Barbara Davis, CCE, Northwest Pump & Equipment and Brett M Hanft, CBA, American International Forest Products, LLC

Save the date – Credit Retreat will be held on Friday April 7, 2023, and hosted at the NACM CS classroom in Portland, OR. More details to follow.

National award nominators are due by March 15, 2023. If you have a nomination for Sprit, Star, Viv, or DMA award, please reach out to a member of the Board. Let's highlight and honor thoughts that make this membership great.

If you have an opportunity to attend an upcoming credit conference or seminar, please make sure you apply for a scholarship. Resources and funding are available through CFDD National, CFDD Portland (Dollars4Scholars), and the NACM CS Foundation, as well as NACM National.

CFDD is a great way to partner with a mentor to help guide you through the steps of designation. If you want to pair up with a mentor, please let me know. Designation courses can be taken in June at NACM Credit Congress in Grapevine, TX, as well as courses are currently being offered our local NACM affiliation.

The Board wants to hear from you. If you have an idea for a topic you'd like to hear, or if you would like to present to the chapter, please reach out to me or Eleanor Hartman, CCE.

All the best,

Alaina Worden, CCE  
CFDD Portland Chapter President



# The Creditline

March 2023

## December Treasurer's Report

**Total beginning balance of Restricted and Unrestricted Funds** 19,000.03

### Unrestricted Funds

Beginning balance as of DECEMBER 1, 2022 14,090.23  
Income 7,559.46  
Expenses 91.00  
Ending balance as of DECEMBER 31, 2022 21,558.69

### Restricted Funds

Beginning balance as of DECEMBER 1, 2022 4,909.80  
Income  
Expenses  
Ending balance as of DECEMBER 31, 2022 4,909.80

**Total ending balance of Restricted and Unrestricted Funds** 26,468.49

### Breakdown of Accounts

Unitus 1 Share Deposit 5.02  
Checking Account Balance 6,619.98  
Outstanding Checks  
Money Market Account Balance 19,843.49  
Ending balance as of DECEMBER 31, 2022 26,468.49

## CFDD MONTHLY EDUCATION MEETING 2023 PROGRAM LIST

Month	Program	Speaker
Thursday, March 9, 2023	Change Management	Jeffery Snipes
Thursday, April 13, 2023	TBD	
Thursday, May 11, 2023	Tame Your Inner Godzilla /Installation of Officers	Heidi Lindgren-Boyce

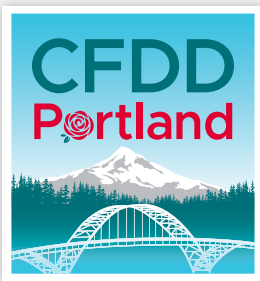
### CFDD Vision Statement—

"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

March 2023

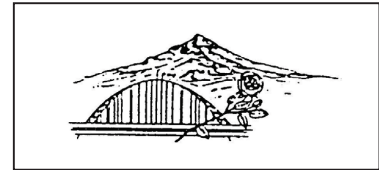


CFDD - PORTLAND CHAPTER  
MONTHLY EDUCATIONAL MEETING

**ZOOM VIRTUAL**

February 9, 2023

4:30 pm



## Minutes

### 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:** - Alaina Worden CCE at 4:33pm

- ❖ **INTRODUCTIONS** Past Presidents & Special Guests in attendance
  - **Past Presidents:** Brett Hanft, CBA; Yvonne Prinslow CCE; Barbara Davis CCE; Debora Diamond-Burt CCE, CICP, Julie McNurney, CBF
  - **NACM CS Board Members:** Tawnya Marsh, CCE, Past Chairman; Eve Sahnaw, CCE, Vice Chairman; Mark Teeter, CCE, CICP, Chairman; Jennifer Walsh; CEO
  - **NACM CS Foundation Board Members:** Brett Hanft, CBA; Alaina Worden, CCE; Eleanor Hartman, CCE
  - **CFDD National Board:** Debora Diamond-Burt, CCE, CICP, Director, Brett Hanft, CBA, NACM Board Representative
  - **NACM/CFDD Liaison:** Clara Nemeth, CCE NACM Commercial Services
  - **Speaker:** Jake Hillemeyer

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

- Treasurer's Report - Debora Diamond-Burt, CCE, CICP
  - Starts at \$19,000.03. Received money from NACM for meeting & annual membership for year. Raffle \$90. Small Expenses, zoom meeting and holiday party. Ends at \$26,468.49.
- Monthly Program - Eleanor Hartman, CCE
  - Tonight: Emotional Intelligence, March: Change Management, April: TBD/ Installation of Officers, May: "Tame Your Inner Godzilla"
- Membership - Yvonne Prinslow, CCE
  - Membership at 46 currently. We received annual dues from NACM.
- Scholarships - Barbara Davis, CCE
  - Not present. Alaina shared Dollars for Scholars available
- Fundraising - Alaina Worden, CCE
  - Tonight: "It's All About You", March: "Rise and Shine", April: "But First Sangria", May: "Gardner's Delight"
- CFDD National - Debora Diamond-Burt, CCE, CICP
  - There is a new simplified CFDD scholarship application. CFDD National Scholarship application deadline extended to 4/30/23.
- Education - Brett Hanft, CBA
  - Not present. Alaina shared more to come but Credit Retreat will be hybrid. April 7<sup>th</sup> at NACM classroom.



# The Creditline

**March 2023**

**BUSINESS MEETING: (0 – 15 minutes)**

- Approval of the January 12, 2023, Meeting Minutes as published in the Creditline.
  - Motion: Elanor Hartman, 2nd: Debora Diamond-Burt. All approved.
- Vote in March for Board Member Nomination – see Creditline
- National Award Nominations due by March 15<sup>th</sup>
  - Spirit, Star, Viv, DMA, Mentorship

**PROGRAM:** Taking your Game to the Next Level – How Can You Use Emotional Intelligence to Advance Your Career

**ANNOUNCEMENTS: (0 - 5 minutes)**

- CFDD Credit Retreat – April 7<sup>th</sup> Portland, OR
- NACM CS Annual Business Meeting – April 12<sup>th</sup>, Portland, OR
- NACM Credit Congress – June 11<sup>th</sup> – June 14<sup>th</sup> Grapevine, TX

**Creditline Deadlines**

<b><u>Submit by:</u></b>	<b><u>For the Issue:</u></b>	<b><u>Submit by:</u></b>	<b><u>For the Issue:</u></b>
January 20	February	February 20	March

**ADJOURNMENT – 5:32pm**

Submitted by Melissa Garcia, CBF  
CFDD Portland Secretary



# 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](mailto: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](mailto:YvonnePrinslow@HamptonLumber.com)