



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=WkhZM1I3OHdrUDJKLOVlVm5qWWU1UT09>

Meeting ID: 462 034 8230

Password: EDUCATION

Program:

Change Management – Practical Applications

Description:

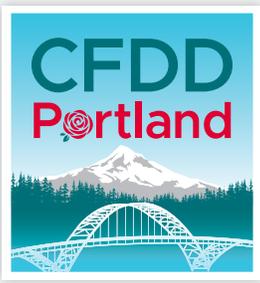
Change Management and how it is in use in the Autodesk Credit Department.

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 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.

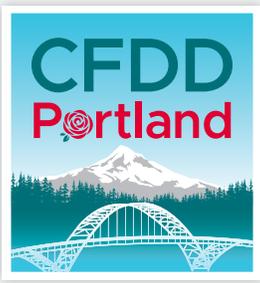
To find out your current dollars for scholars points, you can contact the scholarship chair Barbara Davis, CCE at Barbara.davis@nwpump.com



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.

President	Alaina Worden, CCE, Carson
Vice-President	Eleanor Hartman, CCE Autodesk Inc
Secretary	Melissa Garcia, CBF, Bridgewell Resources LLC
Treasurer	Debora Diamond-Burt, CCE, CICP, Schnitzer Steel Industries, Inc
1-year Director	Kimberly Jones, CBA, Carson
1-year Director	Melanie Etzel, CCE, Cascade Nut & Bolt
2-year Director	Sylvia Schultz, Carson
2-year Director	Bill Heintz, CCE, Bridgewell Resources LLC
Chairman of the Board	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.

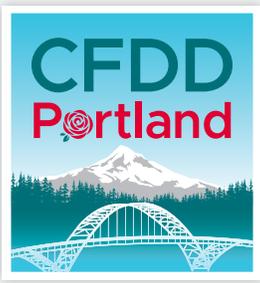
If you have an opportunity to attend an upcoming credit conference or seminar, please make sure you apply for a scholarship. Resources and funding are available through CFDD National, CFDD Portland (Dollars4Scholars), and the NACM CS Foundation, as well as NACM National.

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

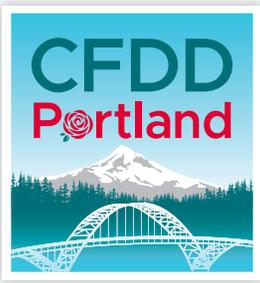
Month	Program	Speaker
Thursday, March 9, 2023	Change Management	Jeffery Snipes
Thursday, April 13, 2023	TBD	
Thursday, May 11, 2023	Tame Your Inner Godzilla /Installation of Officers	Heidi Lindgren-Boyce

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

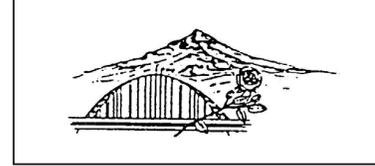


CFDD - PORTLAND CHAPTER
MONTHLY EDUCATIONAL MEETING

ZOOM VIRTUAL

February 9, 2023

4:30 pm



Minutes

GOALS OF THE MEETING:

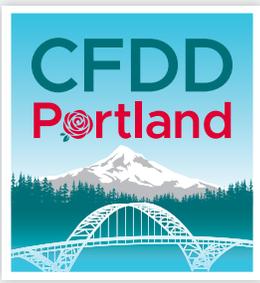
To review, discuss and plan activities that promote professional growth, education, business contacts, and friendships within the CFDD Portland Chapter and the Credit/Finance Community.

❖ **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 Sahnov, 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 Hillemeier

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 7th 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 15th
 - 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)

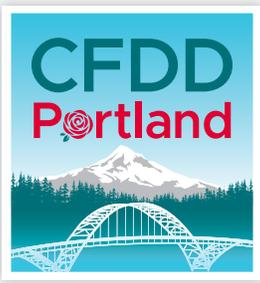
- CFDD Credit Retreat – April 7th Portland, OR
- NACM CS Annual Business Meeting – April 12th, Portland, OR
- NACM Credit Congress – June 11th – June 14th Grapevine, TX

Creditline Deadlines

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

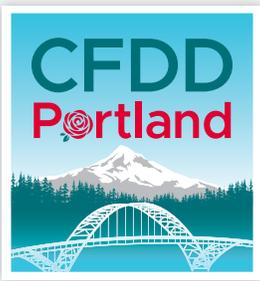
City, State, Zip: _____

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



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