

Risk Management Association

THE SPREADSHEET

<http://community.rmahq.org/pugetsound/home>



April 2018

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FROM OUR PRESIDENT



Greetings fellow RMA members,

RMA runs on what I would call an 'academic calendar.' That means we don't have our usual dinner meetings in the summer. Our fiscal year also runs from September 1 to August 31 each year. Our last dinner meeting of my year as President is June 5 in Tacoma, and come September, we'll have a new President and board as we start our new year. I won't spoil the surprise but, rest assured, the chapter remains in capable hands.

What that means for me is that my term in office is rapidly drawing to a close. That doesn't mean we're slowing down or tapering down. In fact, like any good runner, I know that the best way to finish a race is with a burst of speed! I intend to do just that.

I sincerely hope to see many of you at our upcoming final event of the year at the Pacific Grill Events and Catering in downtown Tacoma at 11:30am on June 5. Jeff Lyon from Kidder Mathews will be speaking on the economies of South Sound, Seattle, and near and dear to my heart Spokane. We are coming off of a very successful event a few months ago in Tacoma and are hoping to continue to grow our presence in the South Sound. We continue to rely on you to help us make that happen. Please join us and show your support for the RMA in the South Sound.

Other upcoming events to round out the year are our Women in Banking Luncheon on April 24 at 11:30am at the Washington Athletic Club. Our featured speaker is Michelle Mathieu from Fulcrum Capital, LLC. We also have an event with our Developing Professionals Group on April 26, 5:30-7:30pm where we will be listening to a construction lending panel. This event takes place at Gordon Biersch, Pilsner Room in downtown Seattle.

If you haven't been to an RMA event in a while, let me extend a personal invitation to you. Join us for this 'burst of speed' and enjoy the company of your peers.

James

CONSTRUCTION LENDING

Developing Professionals Present

Thursday, April 26, 2018

5:30-7:30pm

A panel of professionals with expertise in construction lending. These professionals have ample years in the financial industry and will share their knowledge and experience regarding best practices for construction lending, as well as help identify potential red flags.

Gordon Biersch, Pilsner Room, 600 Pine Street #401, Seattle, Washington (Downtown)

COST: \$25

Gordon Biersch, Pilsner Room, 600 Pine Street #401, Seattle, Washington (Downtown)

Parking: Pacific Place Garage, 1675 7th Ave (Entrances on 6th and 7th Ave) \$6 after 5:00pm

Register by clicking the link below.

https://www.paypal.com/cgi-bin/webscr?cmd=_s-xclick&hosted_button_id=UU52YUNKUS9QY

**OPEN ENROLLMENT
EDUCATION SEMINARS
2018**

April 19, 2018
Credit Analysis
Management Seminar

May 17, 2018
Problem Real Estate Loans

June 25-29, 2018
RMA Lending Academy II

All classes are to be held at
Evergreen Business Capital,
13925 Interurban Ave #100,
Seattle, WA 98168

For more info:
Lori Milton
206-577-1422

Lori.milton@evergreen504.com

**MARK YOUR CALENDARS FOR
ALL CLASSES**

**Bring a Guest and introduce
them to Puget Sound
Chapter Events**

QUESTIONS

If you have registration
questions please contact
Bonnie McGoldrick,
Chapter Administrator on
(206) 282-0158 or
rma@secretarialassistants.com

For further information on
programs go to:

Website

<http://community.rmahq.org/PugetSound/Home>



"YOU HAVE AN EDGE. NOW IS THE TIME TO WORK IT!"

Michelle Mathieu, Chief Investment Officer at Fulcrum Capital, LLC

Tuesday, April 24, 2018 Luncheon 11:30am - 1:00pm
Washington Athletic Club 1325 Sixth Avenue, Seattle



In her 25-year career, Michelle rose through the ranks at Wells Fargo, co-managed two equity mutual funds, launched a trust company at Perkins Coie, led three wealth management firms, and served on a half-dozen nonprofit boards. She currently oversees more than \$1 billion in assets as Chief Investment Officer at Fulcrum Capital, LLC, member of the Whitman College Endowment Investment Committee, board member of the KCLS Foundation, and Chair of the Episcopal Diocese of Olympia Investment Committee. Michelle will share insights that she learned along the way and reveal the philosophy that helped her lead Fulcrum to become the #1 majority women-owned emerging wealth manager in the nation. For details on the 2017 national ranking by RIA Channel®, please visit:

www.fulcrumcapllc.com/fulcrum-ranked-2017-top-100-emerging-wealth-manager/

Cost: \$55

(Please note, parking validation is NOT included in the cost of the luncheon.)
This meeting qualifies for continuing education credit for "Credit Risk Certification."

REGISTER BY APRIL 18, 2018

(If you wish a vegetarian meal please make your request when you make your reservation.)

https://www.paypal.com/cgi-bin/webscr?cmd=_s-xclick&hosted_button_id=RAQ7NUHS5EYYW

**SNAPSHOT OF THE MARKETS/SUBMARKETS IN
SEATTLE, PORTLAND AND SPOKANE**

Featuring Jeff Lyon, Chairman and CEO, Kidder Mathews

Tacoma Lunch Meeting

Tuesday, June 5, 2018—Lunch 11:30-1:30pm

Jeff Lyon has nearly 40 years of experience marketing commercial properties throughout the Puget Sound, with expertise in office and retail leasing and development and advisory services. He has represented and consulted with several financial institutions and local professional services companies in the Puget Sound. Jeff is a certified member of the Commercial Investment Real Estate Institute (CCIM). He was a certified instructor in CCIM's education program for 20 years as well as with the State of Washington. He has also been awarded the prestigious Society of Industrial and Office Realtors (SIOR) designation. Jeff merged his family-owned business with Kidder Mathews in 1992. He worked as a broker and consultant until he was named President and CEO in 1999, was further promoted to Chairman and CEO in 2006, and was recognized as Entrepreneur of the year by Ernst & Young in 2009. Under his leadership, he has been a significant contributor to the success of the Kidder Mathews, most notably leading the expansion of the firm from 4 offices in Washington to 21 offices in 5 states with over 700 professionals and staff, making Kidder Mathews the largest independently owned commercial real estate company on the West Coast. As an active participant in the community, Jeff serves on the Board of Directors for Kidder Mathews, Heritage Bank, Runstad Center For Real Estate Studies at the University of Washington, the Economic Development Council for Tacoma-Pierce County, the CCIM Education Foundation, and the Tacoma-Pierce County Sports Commission.

Pacific Grill Convention Center Courtyard by Marriott, Mt Tahoma Room
1530 Pacific Avenue Tacoma, Washington

No Parking will be furnished.

RMA Member Fee \$55 - click on link to pay using PayPal

https://www.paypal.com/cgi-bin/webscr?cmd=_s-xclick&hosted_button_id=523E8Q4NNHVCA

RMA Non-Member Fee \$65 - click on link to pay using PayPal

https://www.paypal.com/cgi-bin/webscr?cmd=_s-xclick&hosted_button_id=V4JYA4NLTUV4L