Risk Management Association

THE SPREADSHEET

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

THE RISK MANAGEMENT ASSOCIATION
Serving the Financial Services Industry

May 2018

FROM OUR PRESIDENT

Dear friends and colleagues,

It is with a heavy heart I am writing you for the last time as president of our Puget Sound Chapter. It has been a great year for RMA. We have enjoyed robust growth in our membership, which I have enjoyed seeing all of the new faces at our meetings. We have seen great participation at our Tacoma events and look forward to seeing our chapter continue to grow in our South Sound Market. Tuesday, June 5 will be our last monthly meeting for the 2017-2018 fiscal year. I hope to see many of you at the event in Tacoma. Please keep an eye out for other upcoming events including our Developing Professionals Group (DPG) Golf Tournament scheduled for August 9 at the Seattle Interbay Golf Course and upcoming classes being offered. Please keep us informed of anything you need during our summer break. I wish you all a safe and happy summer and look forward to seeing you when we kick off our next year in October. Kind Regards, *James*

The Puget Sound Developing Professionals Group Presents:

TAX LAW CHANGES AND KEY IMPACTS TO MID-MARKET WASHINGTON BUSINESSES

The Puget Sound Developing Professionals Group invites you to join us in hearing two local CPA professionals discuss recent changes to the federal tax law, emphasizing how key elements of the Tax Cut and Jobs Act impact mid-market businesses. Topics will include the new corporate tax rate and the Sec. 199A 20% pass-through deduction, as well as changes to the tax treatment of operating losses, interest expense, and depreciation.

Participants will also be provided with time before the panel presentation for networking with others industry peers in attendance.

Paige Speir, CPA. Paige is a tax manager with Peterson Sullivan. She has eight years of experience in public accounting and has worked with a wide range of clients and tax returns. Paige is a member of the nonprofit and hospitality leadership teams at Peterson Sullivan. She currently serves as Treasurer for the nonprofit organization Families of Color Seattle. Paige received her Master's in Professional Accounting and Bachelor of Arts in Business Administration, Accounting and Finance from the University of Washington.

Matt Spencer, CPA, MBA. Matt is a senior tax associate with professional service group. He serves a broad client base, providing tax compliance and advisory services to individuals and mid-marked companies primarily based in Washington State. Matt has five years of experience as a tax CPA with Peterson Sullivan. He received his MBA from Seattle University and BA from Santa Clara University.

May 24th, 2018 ■ 5:30pm to 7:30pm
Cost: $25

Gordon Biersch, Pilsner Room, 600 Pine Street, Suite 401, Seattle, WA 98101

https://www.paypal.com/cgi-bin/webscr?cmd=_s-xclick&hosted_button_id=8DUWTVGCHG53L

Share in the fun and bring a guest!

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OPEN ENROLLMENT EDUCATION SEMINARS 2018

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
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MARK YOUR CALENDARS FOR ALL CLASSES

Bring a Guest and introduce them to Puget Sound Chapter Events

Summer Golf Tournament

Watch for information on the Developing Professionals Group Summer 2018 Golf Tournament to be held at Interbay Golf Course Seattle on August 9, 2018.

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

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

RMA Lending Academy II

June 25-27, 2018

https://www.rmahq.org/MeetingDetail.aspx?productId=557848539

Master more advanced skills to help you make sound credit decisions

Course Overview

The RMA Lending Academy® II course teaches the analytical process and decision-making techniques needed to make sound credit decisions through the application of financial accounting, financial statement analysis, cash flow analysis, and transaction structuring. Participants will establish a foundation in the following areas of study: business and industry risk analysis, management analysis, financial statement analysis, cash flow analysis, cash flow drivers, debt capacity, forecasting, and transaction structuring.

Who will Benefit?

This course is designed to be the cornerstone of a strong core credit curriculum and will benefit lenders in banks of all sizes.

You Will:

- Perform credit risk analysis to help clients achieve business objectives while at the same time ensuring repayment of debt.
- Create capital structures that meet rate-of-return criteria for all capital providers.
- Identify the sources of debt and equity available to commercial clients.
- Develop a comprehensive framework to analyze businesses and structure financial solutions.
- Create value-added services through a relationship planning and financial advisory orientation to client management.