



FWIT NEWS

VOL 14, ISSUE 2 • MARCH 2023



MELODY HESS
FWIT 2022 - 2023
ASSOCIATION PRESIDENT

A MESSAGE FROM THE PRESIDENT

Have you taken the right turn in 2023?

I hope each of you had a wonderful holiday season and that the New Year is off to a terrific start! It seems like we've just finished placing those containers with all the decorations, rolls of wrapping paper, and holiday lights back in storage for another year. January just breezed by and here we are at the 'sweetest' time of the year in March already.

As part of the New Year, I'm always motivated to have a fresh start and look ahead at the goals I've set for the year. Goals provide us with clarity about the results we're trying to achieve and priorities about how we spend our time, both personally and professionally. They can help us know where we want to go, what we want to improve, and how we will improve.

If you have not already mapped your route to reach the 'destinations' you planned for the year, here are a few suggestions to consider:

1. Visualize success – begin with the destination in mind to see a clear vision of what success will look like.
2. Map out your plan – take time to prepare your route, consider roadblocks and challenges that may prevent success, then how you may overcome them.
3. Write out your goals – keep them in plain sight where you will see them often and can review them regularly.
4. Make your goals attainable – keep them realistic, with some short term so they can be accomplished reasonably within the next 12 months.
5. Create goals with an accountability partner – ask a friend or family member to work together to check in and encourage each other on a regular basis.
6. Measure progress often – when you do this frequently over shorter periods of time, you will be able to see consistency and reward yourself even for the small steps.

Finally, reward yourself for achieving your goals! Keep your wheels on the road and find a good tailwind to provide you with renewed momentum this year!

FINANCIAL WOMEN IN TEXAS NEWSLETTER

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Reminders

Things to keep in mind...

Things to take note of...

Things to add to your calendar...

Things that are due...

Things to do...



General Education Scholarship Winners will be announced 3/24/23

Will it be YOU?



FWIT Association Board Meetings

All members are invited and welcome to attend
the monthly meeting held via Zoom.

3rd Thursday of each month from 9:00-10:00 AM

Zoom Meeting ID and Passcode can be found in the
Members Area of the website:
<https://www.fwitexas.org/>

Meet & Greet Melody Hess,

Association President

as she travels across Texas

April 21 - Paso del Norte Group

June 10 - Summer Leadership Forum



SAVE THE DATE Leadership Forum



SAT | JUNE
10 | 2023

Mark your calendars and start planning to attend the
2023 Summer Leadership Forum on Saturday, June 10, 2023
at **The Lone Star Court in Austin, TX**

The one-day event is hosted by the Association and includes a
leadership workshop, a FWIT Board transition meeting, lunch, and
plenty of networking with other FWIT members and guests.

This "don't want to miss" opportunity is a no-cost event for FWIT
members and is open to non-members for a nominal cost.

More details coming soon!

Join FWIT in **Longview Texas, September 6-8**
for the **14th Annual Financial Women in Texas Conference.**
Full Conference Schedule Coming Soon!

Exclusive Room Rates are available
until 8/6/23. Click **Book Now** to check
out the host hotel,
Holiday Inn Longview | Infinity Event
Center

BOOK NOW



GROUP NEWS

FINANCIAL WOMEN IN TEXAS (FWIT)

BRINGS TOGETHER WOMEN IN FINANCE FOR THE EXCHANGE OF IDEAS, EXPERIENCES, AND INTERESTS



WELCOME NEW MEMBERS

WE KEEP GROWING!

**Say HELLO to all the new
FWIT members across Texas**

Big Country

- Emily Drake
- Megan Scott
- Shanna Rodriguez
- Tori Duncan

East Texas

- Kristal Martin

San Antonio

- Lydia Gonzales
- Terri Luttrell
- Maggie Rodriguez
- Lori Sada
- Cristina Killian
- Melinda Hipp
- Tina Montoya
- Criselda Moncayo
- April Bagley
- Julia Kraemer

Dallas

- Toni Fennell
- Meghann Steward
- Lorene Brana

Gulf Coast

- Veronica Solis
- Teresa Williams
- Kimberly Mendoza
- Terri Morales



Austin

- Chris Furlow
- Bree Hanna
- Brandy Garner
- Jessica Houston
- Sarah Maldonado
- Rasheedah Quarles
- Matt Loyd

Houston

- Sandra Brown-Talavera
- Thanh Chau
- Gina Sprinkle
- Khoun Trier

Hill Country

- Stefanie Herdman
- Ronette Walshak

Paso del Norte

- Veronica Triana

AUSTIN

FWIT Austin Group is looking forward to 2023 being its best year yet! An exciting speaker schedule is set for the year and the Austin FWIT members are ready to welcome the following guests:

April 20th	Russ Peterson, Co-Founder/President, iSpeak
June 15th	Heather Bellino, CEO, Texas Advocacy Project
August 17th	Paul Nunn, Director of Client Education, Pinnacle Financial Strategies
October 19th	Jill S. Vaughan, Smith-Hutson Endowed Chair of Banking, Sam Houston State Univ.
December	Holiday Social Event, date and location TBD



Pictured above L to R: Marisol Cantu, Koren Bowie (Group President), Jennifer Applewhite, Nayer Sikder, Cay Williams, Jocelyn Carby, and Ellie Trace.

In December 2022, Austin FWIT Group Members enjoyed a Holly Jolly time together at their Holiday Social.

To kick off the new year 2023, their meeting on February 16th welcomed a group visit from Association President, Melody Hess, and guest speaker Stephanie Lyon, Vice President of Compliance & Regulatory Content Strategy at Ncontracts. The group enjoyed time with Melody, and learning about how Ncontracts mission to continually improve their clients' ability to manage risk and compliance with the latest technology and integrated platform. See pictures below.



Check the Events calendar on the website for more upcoming meetings in the Austin Group area, or contact Group President Koren Bowie.

DALLAS



Pictured above are a few of The FWIT Dallas Group members who enjoyed a festive and fun Holiday Mixer and Kendra Scott Pop Up at the Dallas-Park Cities Hilton in December.



Pictured above are Dallas Group members who attended the January meeting held at the Gleneagles Country Club in Plano. 10 members and 7 guests attended.



A FWIT favorite speaker, Julie Burch, pictured above, presented "Work Life Balance is a Myth" at the January meeting. She shared valuable skills on how to define and create your own sense of balance while avoiding comparisons with others.

Pictured below are Dallas Group Officers. From L to R: Lauren Wilson, Casi Burchinal, Judy Helm (President), Louann Habenicht, Lorene Brana, and Amy Thorpe



The next program meeting is scheduled for March 21st, with guest speaker Matthew Smith, Director of Innovation Initiatives with IBAT. Be on the lookout for information about upcoming meetings moving to an area restaurant with a meeting room, and don't forget to invite others to join FWIT and the Dallas Group! Contact Group President, Judy Helm for more info.

EAST TEXAS

FWIT East Texas Group continues to gear up for hosting the 14th Annual Conference in Longview, September 6-8, 2022, meanwhile also keeping busy hosting monthly meetings.



The Annual CEO Night and Dessert Auction was a success with over \$3500 raised for scholarships. This year it was held on November 15th at the Pine Crest Country Club in Longview. The East Texas Group enjoyed a special visit that night from Association President, Melody Hess, and also welcomed speaker Celeste Embry, TBA General Counsel, and guest auctioneer Judge Tim Bryan, pictured to the left.



The East Texas group is thankful to member Janet Sledge for opening her beautifully decorated home and hosting the group's Christmas party. It was a fun night filled with plenty of food, games, and laughs. Pam Mitchell, pictured on the bottom left-hand side was the big winner of "Left, Right Center". Money for the Hearts and Hands of East Texas was also collected for the Christmas community project.



**Let's Conference
in East Texas
2023**



The January meeting was held on the 17th at the Holiday Inn with guest speaker Chief Deputy Craig Harrington of the Gregg County Sheriff Department. Members and guests enjoyed his presentation on financial crimes in the East Texas area and across the state.



The Zonta Prom Boutique was the group's community project for January. Members above are pictured showing off dresses and accessories collected this year, adding to the count of over 100 that have been donated over the years to this worthy project.

GULF COAST

FWIT Gulf Coast Group enjoyed time together at the November 17th, 2022 Mixer/Social held at Pier 36 in Fulshear. Pictured below are the 10 FWIT members and 6 guests that attended the evening meeting.



Pictured above is Association President, Melody Hess, talking about the History of FWIT, her theme for the new year, and the benefits of being a FWIT member. First time conference 2022 attendees also shared about their experience and their involvement with FWIT.



Gulf Coast FWIT members pictured to the left enjoyed a members only evening of holiday celebration at the Ol' Railroad Café in Rosenberg on December 8th, 2022. Program speakers, Roxann Sebring and Patricia Swagerty, FBI Forensic Accountants shared information related to SARs. The night ended with a fun gift exchange and networking.

The group's February 9th meeting was CEO Appreciation and Dessert Auction night at the Wharton Country Club.

Members and guests heard from Julieta Ezeiza, AVP, Federal Reserve Bank of Dallas, who presented on the US & Regional Economic Overview. The auction was a huge success, with over 24 desserts donated bringing in over \$2,200!



HOUSTON

FWIT Houston Group was excited to close out the 2022 year with a very successful holiday luncheon on December 14th, 2022, held at The Cadillac Bar.



The featured meeting speaker was Jill Vaughn, Sam Houston State University Banking Chair. Her presentation on "Success is what you say it is...you do you" was invigorating. The Houston Group also welcomed a visit from Association President, Melody Hess who shared her theme for the year "Go the Distance, Map Your Field of Dreams." The group enjoyed the visit with Melody and the presentation from Jill, along with all the fun of participating in the annual white elephant gift exchange. Pictured above are most of the 38 women who attended the December event, which included 9 guests. This was definitely the largest attendance the Houston group has seen since before COVID. They are excited to keep the momentum going as they continue to grow!

February 15th was filled with fun and FWIT Friendship as the Houston Group gathered to enjoy a Galantines Event at the Memorial Wine Cellar.



SAN ANTONIO

FWIT San Antonio Group has been busy hosting monthly meetings and is pleased and honored that 12 new members have joined since the beginning of the program year. There is always a lot of networking energy in San Antonio!



The group met in November 2022 and welcomed a program presented by Ronald McDonald House Charities. They had a successful collection of items donated to families using the RMH locations in San Antonio.



In December 2022 San Antonio FWIT group members gathered for a holiday social and dinner, and the traditional holiday ornament exchange which is always fun!



January's meeting included a visit from Association President, Melody Hess, and FWIT Member, Sandy Sullivan, presented the program topic "Elder Abuse and Exploitation...It's Everyone's Business!"



The February 9th meeting offered a wonderful opportunity for members and guests to hear from Kelly Barclay, President & CEO of Ozona Bank. Her story and journey to the C-Suite is inspiring!

Check the Events calendar on the website for more upcoming meetings in the San Antonio Group area, or contact Group President Novie Allen.

PASO DEL NORTE

FWIT Paso Del Norte Group met for its annual Christmas gathering on Saturday, December 10th, 2022 at Mamacita's Cantina in downtown El Paso.



The beautiful weather and scenery were an added bonus for the women who took time out of their weekend to get together and enjoy each other's company before the holiday season was in full swing. Pictured above L to R are group members: Nancy McElroy, Bernadette Ramos, Jenny Turner, Barbara McMillen, Courtney Yeatman (Group President), Anita Werner, Angelina Reyes (Vice President) and Audrey Zamora (Treasurer).



The Paso Del Norte Group kicked off 2023

with virtual guest speaker and FWIT Member Paul Nunn, Director of Client Education, Pinnacle Financial Strategies.

The topic he presented "The Employee Lifecycle" engaged everyone's thinking about the impact to business and customer service, and how to better understand how to use the information.

The next Paso Del Norte Group Meeting

is scheduled for Friday, March 17th @ 12 PM and will be held via Zoom.

Association Group President, Melody Hess

will visit with the Paso Del Norte Group on Friday, April 21st. Be on the look out for information and more details coming soon!

Check the Events calendar on the website for more upcoming meetings in the El Paso area, or contact Group President Courtney Yeatman.

DEBBIE PETERSON

THE WAY FORWARD MASTERCLASS

Join FWIT for the Summer Leadership Forum on Saturday, June 10th, in Austin, Texas at the Lone Star Court, where Masterclass presenter Debbie Peterson will be presenting **"Your Roadmap to Success by Design, not by Default."**

Here's why you won't want to miss this highly interactive program:

- You will explore who you authentically are and how to leverage that in your leadership and life.
- You will define success for yourself so you can stop chasing everything, and instead focus on what really matters.
- You will identify how to make aligned decisions to create more happiness, joy, and fulfillment.
- You will understand how to incorporate the rest of your life as a working professional with strategies to bring you into balance.
- You will be reminded of who you are, get clarity on the right path forward for yourself, and take action toward living your life as your best self.

Success shouldn't come at the expense of who you are. It should bring out the best of who you are! AND learning how to make it happen will be WORTH ATTENDING!



Watch Debbie's recorded message about her upcoming workshop at the FWIT Summer Leadership Forum in Austin on June 10th, 2023. Click the Watch Now button below:





March

Women's History Month

From International Women's Day to Women's History Week and now Women's History Month, we celebrate the many contributions women have made across the U.S., and take time to recognize their specific achievements made over the course of American history no matter the field or industry.

To the many FWIT women members who have shared their strength, talents, time and expertise to help the organization accomplish its mission of furthering the meaningful professions or careers of our members and women in general, and who have served as leaders, mentors, guides, advisors and super doers, this is your month!

We CELEBRATE YOU!



We want to CONNECT with YOU!



PREFER PHOTOS AND VIDEO MEDIA
FOLLOW US ON INSTAGRAM HERE: FWITINSTA
[HTTPS://WWW.INSTAGRAM.COM/FWITINSTA/](https://www.instagram.com/fwitinsta/)



PROFESSIONAL RELATIONSHIPS MATTER
CONNECT WITH US ON LINKEDIN HERE:
[HTTPS://LNKD.IN/GHF7G9GV](https://lnkd.in/gHF7G9GV)

thank YOU



**FINANCIAL WOMEN
IN TEXAS**

helping women succeed

You can't have a thriving Association without a highly engaged Board. As we are halfway through the year, it's time to say THANK YOU to all of the Presidents who are leading the FWIT local groups and all of the Board of Directors who are leading at the Association level. Thanks for all you do to ensure FWIT continues to bring women in finance together for the exchange of ideas, experiences, and interests.

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Austin, TX

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Laura Rodgers
Longview, TX

Houston
Lori Victory
Houston, TX

Paso del Norte
Courtney Yeatman
El Paso, TX

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