



## 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

April 2023

## ZOOM VIRTUAL MEETING

**April 13, 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:

Jeffery 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

April 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

*But First Sangria's*

Suggestions include red/white wine, fresh fruit, wooden spoon, large beverage holder, cups, sangria recipe book, 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 *Gardener's Delight*



**Thank you** to all participated in the March raffle, together we raised \$140 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)



# The Creditline

**April 2023**

## **President's Message**

Spring is finally in the air, the birds are active, and my flowers are starting to bloom. Exciting times after what seems like the most dreadful winter in a few years – with record rainfall, and more snowy days than normal it a refreshing sight to see.



I am thrilled to share with you that after a two-year hiatus, the CFDD Portland Chapter is hosting our annual Credit Retreat in hybrid format. This full day educational event will benefit both new and seasoned credit professionals. Enhance your skills and network with colleagues in credit and finance.

Join us Friday April 7, 2023, at the NACM CS classroom in Portland or via Zoom as attorney Jason Toft begins our educational session with a presentation on Credit Enhancements, after a short break, he will present on the new Bankruptcy Provision to Subchapter 5 of the Bankruptcy code with an in-depth and hands on case study. Afternoon lineup features attorney Karen L Hart as she shares a presentation on effective electronic communication – How to Email Like a Rock Star and Win Your Case. She will close out the afternoon session on a hot new topic – Cryptocurrency, NFT's and the Metaverse: Office of the Future? Breakfast, snack, and lunch is all included with your registration. Of course, there will be prizes throughout the event.

I've had the pleasure of hearing both speakers present previously and hands down I will say this is a great educational opportunity. We hope to see you there! The registration form is attached, and scholarships are still available through CFDD Portland Chapter – attached to Creditline and NACM CS <https://www.nacmcommercialservices.org/wp-content/uploads/2023/02/Foundation-Scholarship-Application.pdf>

Speaking of scholarships CFDD National has graciously extended the deadline for this year's NACM Credit Congress. Take advantage of this opportunity and join us June 11-14, 2023, in Grapeview, TX. Scholarship includes full registration, and CFDD luncheon, valued over \$1,000.00. Scholarship forms are located on the CFDD website - <https://nacm.org/scholarship-award/apply-for-a-scholarship.html>. If you need help completing your application, let us know. We are happy to help.

CFDD is a wonderful way to partner with a mentor to help guide you through the steps of designation. If you are interested of being paired up with a mentor, please let me know. Designation courses can be taken in June at NACM Credit Congress, online, as well as through 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, Alaina Worden, CCE [alaina.worden@carsonteam.com](mailto:alaina.worden@carsonteam.com) or Eleanor Hartman, CCE [eleanor.hartman@autodesk.com](mailto:eleanor.hartman@autodesk.com).

All the best,

Alaina Worden, CCE  
CFDD Portland Chapter President



# 2023 CFDD Portland Credit Retreat

**Friday, April, 7, 2023**

**\*\*NOTE\*\* -- Attend 'In Person' OR Virtual/Remote**

8:00 a.m. – Registration

8:30 a.m. – 4:30 p.m.

*NACM Commercial Services Classroom*  
7931 NE Halsey St, Portland, OR 97213

This full-day educational event will benefit new and seasoned credit professionals. Enhance your skills and network with colleagues in credit and finance.

## Speakers:

Jason Torf, Partner, Tucker Ellis LLP, Chicago, IL  
Karen L Hart, Bell Nunnally & Martin LLP, Dallas, TX

## Friday, Morning Session

**Jason Torf** will begin our educational offerings with a presentation on **Credit Enhancements**. These 'security measures' are more important now than ever to help ensure you get paid. Learn about the intricacies of guarantees (personal, corporate, cross corporate), UCC's, PMSI's, letters of credit, Puts, etc.

After a short break, Jason will switch topics and cover **Subchapter 5 of the Bankruptcy code**. Find out about the 'nuts and bolts' of this recently added provision, followed by an in-depth and hands on case study detailing the practical application of seeing how the Subchapter 5 was used in a recent bankruptcy case.

## Friday, Afternoon Session

Following lunch, **Karen L Hart** will help attendees learn how to **"Dance Like No One is Watching But Email Like it May Be Read Aloud in a Deposition"**. Presenting this topic of effective electronic communication has relevance and importance to every credit and finance professional. This is a program you do not want to miss!!!

After a short break, Karen will dive into a new program topic – **"Cryptocurrency, NFT's and the Metaverse: Office of the Future?"**. This is a hot topic many people have not heard anything about. We are so excited for Karen to present this session to our attendees!

This will, most assuredly, be an action packed day of educational sessions that is timely and relevant to every person working in the credit and finance profession.

## Registration:

**Member:** \$185 (All NACM / CFDD members)

**Non-Member:** \$225

(Continental breakfast, Lunch, and refreshments during two breaks will be provided.)

Contact Brett M Hanft, CBA at hanft@lumber.com or 503-520-5451 with questions about this CFDD Portland Credit Retreat event.



# 2023 CFDD Portland Credit Retreat

April 7, 2023 8:30 am – 4:30 pm  
 NACM Commercial Services Classroom  
 7931 NE Halsey St, Portland OR

Name: \_\_\_\_\_  
 Company: \_\_\_\_\_  
 Billing Address: \_\_\_\_\_  
 City, State, Zip: \_\_\_\_\_  
 Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**Cost:**

CFDD Members	\$185
NACM Members	\$185
Non-NACM Members	\$225
Non-CFDD Members	\$225

Please Process the Following Registration:

- CFDD/NACM Member  Non-Member

Please indicate how you are attending:

- In-Person  Remote

Please advise if you have any dietary restrictions or food allergies: \_\_\_\_\_

**Payment Options:**

- Bill NACM account. Member# \_\_\_\_\_  
 (NACM members only).  
 Check enclosed.  
 (Please make checks payable to CFDD Portland.)

**Scholarship Recipient?**

(If yes, please identify scholarship award.)

- Portland Chapter  
 NACM Commercial Services Foundation  
 Other

If you need to use another form of payment please leave payment contact information below. For Security purposes we are not collecting credit card information via a form.

Name: \_\_\_\_\_  
 Phone: \_\_\_\_\_ Email: \_\_\_\_\_

If billing your NACM account OR paying with credit card, please scan and email completed registration forms to: Yvonne Prinslow, CCE, [yvonneprinslow@hamptonlumber.com](mailto:yvonneprinslow@hamptonlumber.com) or fax to 503.291.5653. If 'check enclosed,' please make checks payable to CFDD Portland and mail to: Yvonne Prinslow, CCE, C/O Hampton Lumber, 9600 SW Barnes Rd., Ste. 200, Portland, OR 97225-6698.



# The Creditline

April 2023

## February Treasurer's Report

<b>Total beginning balance of Restricted and Unrestricted Funds</b>	26,468.49
<b>Unrestricted Funds</b>	
Beginning balance as of FEBRUARY 1, 2022	21,558.69
Income	192.67
Expenses	96.99
Ending balance as of FEBRUARY 28, 2022	21,654.37
<b>Restricted Funds</b>	
Beginning balance as of FEBRUARY 1, 2022	4,909.80
Income	
Expenses	
Ending balance as of FEBRUARY 28, 2022	4,909.80
<b>Total ending balance of Restricted and Unrestricted Funds</b>	26,564.17
<b>Breakdown of Accounts</b>	
Unitus 1 Share Deposit	5.02
Checking Account Balance	6,692.99
Outstanding Checks	
Money Market Account Balance	19,866.16
Ending balance as of FEBRUARY 28, 2022	26,564.17

## CFDD MONTHLY EDUCATION MEETING 2023 PROGRAM LIST

Month	Program	Speaker
Thursday, May 11, 2023	Tame Your Inner Godzilla /Installation of Officers	Heidi Lindgren-Boyce
Thursday, June 8, 2023	TBD	
Thursday, July 13, 2023	No Meeting	

### 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."

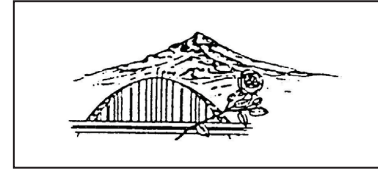


# The Creditline

April 2023



CFDD - PORTLAND CHAPTER  
MONTHLY EDUCATIONAL MEETING



**ZOOM VIRTUAL**

March 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 4:35pm

- ❖ **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: Jeffrey Snipes, CICP – Autodesk- Postponed- wasn't able to attend

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

- Treasurer's Report - Debora Diamond-Burt, CCE, CICP
  - Not in attendance. Barbara Davis shared we started at \$26,468.49. End at \$26,564.17. Income \$192.67, Expenses \$96.99.
- Monthly Program - Eleanor Hartman, CCE
  - Tonight: Credit Jeopardy, April: Change Management /Installation of Officers, May: Tame Your Inner Godzilla
- Membership - Yvonne Prinslow, CCE
  - Holding steady at 46 members.
- Scholarships - Barbara Davis, CCE
  - Dollars for Scholars available. Offer of 3 scholarships for Credit Retreat registration.
- Fundraising - Alaina Worden, CCE
  - Tonight: "Going Green" St. Patrick's Day themed, April: "But First Sangria's, May: "Gardner's Delight", June: "Keep Calm and Sparkle On"
- CFDD National - Debora Diamond-Burt, CCE, CICP
  - In leu of holding CFDD National Conference this year. Promoting a CFDD track of Ed programs through Congress. Board making an effort to encourage attendance so offering scholarship that will pay entire registration to congress and registration. Value at \$1k. Deadline approved to reopen for scholarship applications. This is still available if you apply now.



# The Creditline

April 2023

- Education - Brett Hanft, CBA
  - CFDD Portland Credit Retreat Friday, April 7<sup>th</sup>. Committee meeting tomorrow. Registration will go out ASAP. Hybrid format being offered. Jason Torf will be the speaker for both morning sessions in person.
    - 1<sup>st</sup> Session: Jason Torf- Credit Enhancements
    - 2<sup>nd</sup> Session: Jason Torf-Sub-Chapter 5 Bankruptcy code with case study
    - Lunch
    - 3<sup>rd</sup> Session: Karen Hart – Electronic Communications
    - 4<sup>th</sup> Session: Karen Hart – Cryptocurrency and the Metaverse

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

- Approval of the February 9, 2023, Meeting Minutes as published in the Creditline.
  - Motion: Melanie Etzel, 2nd: Kim Jones. All approved.
- Vote for Board Member Nomination as published in January/February Creditline
  - Motion: Julie McNurney, 2nd: Yvonne Prinslow. All approved.
- National Award Nominations due by March 15<sup>th</sup>
  - Spirit, Star, Viv, DMA, Mentorship

**PROGRAM:** Change Management – Practical Applications. Update: speaker not available. Credit Jeopardy tonight.

**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> March 20	<b><u>For the Issue:</u></b> April	<b><u>Submit by:</u></b> April 20	<b><u>For the Issue:</u></b> May
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**ADJOURNMENT** – 5:31pm

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 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](mailto:YvonnePrinslow@HamptonLumber.com)