



CFMA Central Ohio eNewsletter

Construction Financial Management Association CENTRAL OHIO CHAPTER

Since 1988



Presenters:

Phillip Rosen, Haughn & Associates, Inc
Major Bemhold, CIC
Dane Albright, CLU, ChFC, LUTCF

Description:

Cincinnati Life, along with Haughn & Associates, will present on the different alternatives in perpetuation planning and the balance sheet financials that support the business.

Learning Objectives:

Learning the importance of business perpetuation for all sizes of businesses; discovering how an unexpected death could impact a business' financials; and how life insurance can play a key role in keeping a business moving forward.

When:

Tuesday, February 21, 2023

11:30 – 12:00 Registration and Networking
12:00 – 1:00 Lunch and Presentation

Where:

Fawcett Center
2400 Olentangy River Rd, Columbus, OH 43210

CPE Credit:

The presentation will count for 1 CPE Credit

Registration:

Please register for this event online at
<https://cenohio.cfma.org/chapters/events>

\$25 for CFMA members and \$35 for non-members
Contact Jill Claire centralohio@cfma.org with questions.

Who Should Attend:

Financial and accounting professionals with construction companies and their financial advisors.



<http://cafe.cfma.org/centralohio/home>

[Click here to purchase your ticket now!](#)

Construction Financial Management Association

CENTRAL OHIO CHAPTER

Since 1988

Bios:



Phillip Rosen

Phil Rosen has been in the Financial Services industry since 1996. Phil has held positions as an Agent, Registered Representative, Sales Manager and Sales Trainer. Phil is the Account Executive for Individual Financial Products and has been with Haughn & Associates, Inc. since 2016.



Major Bernhold

Major Bernhold has a Bachelor of Science degree in Business Administration from the University of Dayton with a major in Finance. He has earned his Certified Insurance Counselor designation in 2019 and Master of Business Administration from the University of Dayton in 2022. Major is currently a Life Marketing Director with The Cincinnati Life Insurance Company with a territory of Toledo, Dayton, and Columbus, Ohio. Major has been with Cincinnati Life since 2015.



Dane Albright

Dane Albright has a Bachelor of Science degree in Business Administration with a focus on marketing from The University of Akron. He has continued studies through The American College and attained both the Chartered Life Underwriter and Chartered Financial Consultant designations. He is a member of NAIFA Cleveland, as well as the Cleveland Chapter of the Society of Financial Services Professionals. Dane currently is the Advanced Markets Manager for The Cincinnati Life Insurance Company.

CPE:

The Construction Financial Management Association (CFMA) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: <https://www.nasbaregistry.org/>



<http://cafe.cfma.org/centralohio/home>



Save the Date
September 20-21, 2023
Buckeye Conference

[Please Click Here for Sponsorship Opportunities](#)



2023

BUCKEYE
CONFERENCE

20 - 21 | SEPTEMBER

GRANDVIEW EVENT CENTER AT GRANDVIEW YARD
COLUMBUS | OHIO



KEYNOTE SPEAKERS:

CHRIS MCALISTER
MAURICE CLARETT

EARLY BIRD SPONSORS:

Commerce Bank
Crowe
FORVIS
Plante Moran
Viewpoint

Grandview Event Center at Grandview Yard - Columbus, OH
2023 BUCKEYE CONFERENCE

SPONSORSHIP OPPORTUNITIES

Benefits	Platinum \$3,000	Gold \$2,000	Silver \$1,000	Bronze \$750	Keynote Speaker #1 Lee Arritt \$5,000 SOLD OUT	Keynote Speaker #2 Chris McAlester \$5,000	Wednesday Reception/Dinner \$3,500	Tuesday Reception \$1,000 SOLD OUT	Wednesday Reception \$1,500 SOLD OUT	Lunch \$500 SOLD OUT	Breakfast \$1,000 SOLD OUT
Number Available:	unlimited	unlimited	unlimited	unlimited	1	2	2	1	1	2	2
Headline sponsor	Conference				Conference	Conference	Conference and Dinner	Pre-Event Reception Only	Cocktails only	Lunch Only	Breakfast Only
Name on cards on both sides of conference room	√				√	√	√				
Introduce Keynote speaker					√	√					
Verbal recognition at beginning of conference, lunches and reception	√				√	√	√				
Recognition on placemats	√	√	√	√	√	√	√	√	√	√	√
Logo on conference materials	√	√	√	√	√	√	√	√	√	√	√
Logo and link on conference web page	√	√			√	√	√				
Booth	√	√	√		√	√	√	√	√	√	
List of attendees	√	√	√		√	√	√	√	√	√	
Registration for # attendees	2	1			2	2	2				
Recognition on Powerpoint display throughout conference	√	√	√	√	√	√	√	√	√	√	√

SIGN UP TO SPONSOR TODAY! 

COMPANY NAME: _____
 CONTACT NAME: _____
 WISHES TO SPONSOR: _____
 AMOUNT OF SPONSORSHIP: _____
 CONTACT NUMBER: _____
 CONTACT EMAIL: _____

PLEASE SEND SPONSORSHIP REGISTRATION TO:

CFMA Central Ohio Chapter
 Email: centralohio@cfma.org
 Jill Claire, Chapter Administrator
 Phone: 513-939-2652

REGISTER ONLINE HERE

To help keep event costs down, CFMA appreciates sponsors paying by check which includes the option to pay half now and the other half by 7/17/2023

20 - 21 | SEPTEMBER 

A banner for the Ohio Construction Conference. The background is a faded image of a construction site with several tower cranes against a light sky. The text is overlaid on the right side of the banner.

Ohio
Construction Conference

Save the Date!
March 15, 2023
7AM – 5 PM
The Ohio Union

www.bx.org/ohio-construction-conference.php

For information, contact:
Deb Murphy, Conference Director
dmurphy@bx.org | (614) 486-9521, x215

[Click here for more information!](http://www.bx.org/ohio-construction-conference.php)



FOUNDER'S RECOGNITION

PROUDLY PRESENTED TO THE
CENTRAL OHIO CHAPTER

A handwritten signature in black ink, appearing to read "Thomas Borgia".

THOMAS BORGIA
CHAIRMAN



A handwritten signature in black ink, appearing to read "Stuart Binstock".

STUART BINSTOCK
PRESIDENT & CEO



INSTITUTE OF CERTIFIED
CONSTRUCTION INDUSTRY
FINANCIAL PROFESSIONALS

5 STAGES
OF PROJECT MANAGEMENT



An Inside Look at the Construction Project Management Life Cycle

by Gregory Elpers

The basics of project management build on one another throughout a project and make up what is known as the construction project management life cycle.

Taken from nearly two decades of working with some of the most profitable and successful contractors and their PMs, this article identifies best practices within each phase of the project management life cycle - initiation (or pre-bid), project planning, controlling the project, executing the project, and closeout.

Whether you're new to construction or a seasoned CFM, carefully review and discuss this information with your PMs (and their teams) to help ensure each project's success.

[Click here to read more!](#)



Needs Analysis & Implementation Tool

This Needs Analysis & Implementation Tool has been developed by the Construction Industry Alliance for Suicide Prevention to aid companies in evaluating how they address mental health and suicide prevention in the construction workplace. It will also help determine how prepared they, and their employees, are to handle a mental health or suicide crisis.

[To learn more, please click here!](#)



We are currently seeking nominations for the chapter's 2023-24 Board of Directors.

CFMA CENTRAL OHIO BOARD NOMINATIONS

*Email centralohio@cfma.org with nominations
Deadline February 28th*

The term will begin on April 1, 2023 and self-nominations are encouraged. The Board is a great place to build fun relationships with your peers and influence the local construction finance industry.



Central Ohio Chapter
Sponsorship Opportunities



	Platinum \$2,500 (Only 6 Available)	Gold \$1,250 (Unlimited)
Chapter Website (centralohio.cfma.org)	<ul style="list-style-type: none"> ➤ Logo on chapter Home Page with hot link to Sponsor's website 	<ul style="list-style-type: none"> ➤ Logo on chapter Home Page
Chapter Email Distribution	<ul style="list-style-type: none"> ➤ Sponsor logo on all emails ➤ Sponsor logo in newsletter 	<ul style="list-style-type: none"> ➤ Sponsor logo on all emails ➤ Sponsor logo in newsletter
Monthly Luncheons (7 Annual)	<ul style="list-style-type: none"> ➤ Prominent signage at each luncheon ➤ Verbal mention at beginning of each luncheon ➤ Lead sponsorship for one luncheon; includes speaker introduction, time to introduce your Company and members in attendance, and offer to assist in planning the luncheon programming ➤ Two (2) complimentary admissions¹ to each program (\$490 value²) ➤ Table space made available for sponsor's marketing materials 	<ul style="list-style-type: none"> ➤ Prominent signage at each luncheon ➤ Verbal mention at beginning of each luncheon ➤ Two (2) complimentary admissions¹ to each program (\$490 value²) ➤ Table space made available for sponsor's marketing materials
Events (social, educational, other)	<ul style="list-style-type: none"> ➤ Prominent signage at each event ➤ Verbal mention at beginning of each event 	<ul style="list-style-type: none"> ➤ Prominent signage at each event ➤ Verbal mention at beginning of each event
Golf Outing	<ul style="list-style-type: none"> ➤ Name and logo on flyer ➤ Name on email promotions ➤ Name on sponsor board ➤ Verbal and visual recognition at dinner ➤ Four (4) complimentary admissions to golf and dinner (\$580 value) ➤ One hole sponsorship (\$100 value) with sign, table and chairs, if desired 	
Included Value	\$1,170 (47% of contribution)	\$490 (39% of contribution)

1 The total Program Admissions allotted can be used at your discretion throughout the fiscal year 7/1/20-6/30/21.

2 Admission price is based on non-member rate of \$35/person.



Columbus used to be where the NFL held its headquarters. From 1927-1932, the NFL occupied a building on the intersection of High and Broad Streets.

[To learn more, click here!](#)

Platinum Sponsors



Gold Sponsors



