



OCTOBER 2015



SHRM

Montgomery

ADVANCING THE PROFESSION AND SERVING THE PROFESSIONAL

General Membership Meeting

- Date:** Tuesday, October 27th, 2015
Topic: **Associate Engagement**
Speaker: **Austin Suellentrop, MS**
VP Organizational Effectiveness
Regions
Sponsor: **Stifel**
Time: Luncheon Meeting
11:30am – 1:00pm
Location: **Capital City Club**
201 Monroe Street #2100
Montgomery, AL 36104



Please welcome new members:

Jasmine Bibb
Daphne Charley
Tamaniek McGhee

Registration Deadline: Friday, October 23rd, 2015

NOTE: All registrations should be submitted **2 business days prior** to the meeting.

Meeting Guidelines Checklist:

- Please go to <http://shrmontgomery.shrm.org> and click the “Meeting Reservation Link.”
- All members, guests and students must go to the website to make a reservation in order to attend the meeting.
- Cancellations must be made 24 hours in advance of the meeting. SHRM-Montgomery reserves the right to bill if cancellation is not made in a timely manner.
- Luncheon Meeting Fees, payable at the door
 - Basic Members (excluding all-inclusive members) - \$15
 - Guests - \$20



Ying "Springna" Zhao
Vice President/Investments

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Montgomery, Alabama 36104

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szhao@stifel.com

STIFEL

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At Stifel, we have established ourselves as one of the nation's leading wealth management and investment banking firms. With more than 380 offices in 45 states and the District of Columbia, our philosophy on investing is grounded on a 125-year-old tradition of trust, understanding, and solid, studied advice. Established in 1890, our company provides a comprehensive portfolio of financial services designed to meet the varied needs of a broad range of investors.

We believe in strong individual relationships that stand the test of time. Our knowledgeable Financial Advisors offer a personalized approach to finding the best solutions for your financial needs. We truly believe that by placing your needs and interests first, you will prosper. We are dedicated to providing innovative, creative, high-quality, and value-added products and services to help you pursue your goals.

Education

- B.A., International Relations and English, China Foreign Affairs University
- M.B.A., Auburn University

Licenses

- Series 7, General Securities Representative
- Series 66, Investment Advisor Representative
- Life, Health, and Variable Insurance

Experience

Springna began her investment industry career in 2007 and joined Stifel in 2015 as part of the firm's acquisition of Sterne Agee. Prior to becoming a financial advisor, she served as Special Advisor to the Alabama Governor's Office on China Trade and Commerce.

Memberships

- Member, Auburn University Alumni Association
- Advisor, Central Alabama Association of Chinese

Philosophy

My passion to help clients to pursue their lifetime goals through sound investment strategies and planning came from my mother, who began investing in the stock market in the 1990s and taught me a great deal. Her investments were used to fund my education, which allowed me to grow academically and personally. Since then, my goal has been to help others do the same, to build sensible and strategic wealth management portfolios, giving them the tools to work toward financial freedom and their objectives in life. I enjoy being a Financial Advisor and take pride in my work. I sincerely value every client relationship and strive to do my best to assist my clients with the highest standard of dedication and ethics. Prior to becoming a financial advisor, I consulted on China-related projects for Alabama Governors Robert Bentley and Bob Riley and Lieutenant Governor Kay Ivey.

My specialties include, but are not limited to:

- Comprehensive wealth management and investment planning, working with clients' CPAs and estate planning attorneys
- Separately managed accounts
- Individual stock, mutual fund, and fixed income portfolios
- Retirement planning
- Annuities and other insurance products
- Asset allocation



Mark your calendars for **Tuesday, November 3rd** for our next Montgomery Management Roundtable Meeting!

There is *no fee to attend and lunch will be provided*, compliments of Lehr Middlebrooks & Vreeland, P.C.

Subject: Seasonal Fall HR Topics

1. DOL Exempt Employee Salary Changes: Employer Options and Strategies for Compliance without Conflict.
2. National Labor “Revolution” board Developments: Temporary Employees, Outsourced contractor Employees, What’s “Protected Activity” and Unionization Update.
3. Pay Transparency: Moving to “Keep Pay Confidential” to “Tell Everyone”?
4. EEOC Developments: Sexual Orientation and Disability Discrimination; Litigation and EEOC Case-handling Changes.

Richard I. Lehr of Lehr Middlebrooks & Vreeland will review these and other developing issues, with suggestions of “can do” approaches for employers. Each participant will receive a comprehensive handout. Lehr Middlebrooks & Vreeland represents employers nationally regarding workplace issues.

The Roundtable will be held on **Tuesday, November 3rd**, from **11:30 am to 1:00 p.m.** in the Auditorium at MAX Credit Union located at 400 Eastdale Circle. You are welcome to bring guests to the meeting; additionally, don’t hesitate to pass this information on to anyone you feel might be interested in attending. Please reserve your place(s) by emailing Jamie Brown@jbrown@mymax.com. Please include your name, the name of your company, and the names of any guests. **Deadline for reservations is noon on Thursday, October 29th.** Please let us know if after making reservations you cannot attend, so we can provide an accurate count for the meeting room and lunch.

I look forward to seeing you at the Roundtable for what promises to be a fast paced and informative session. If you have questions, please feel free to contact me at (334) 215-4982. Make those reservations now!

Jamie Brown, SPHR



Speakers needed for TSHRM

Montgomery's TSHRM chapter is in need of HR professionals to come speak at their meetings. You can choose your topic. Please contact Deneen Hughes at deneen.hughes@fortiscollege.edu for more information.

Thank you for your help.


Are you eligible for SHRM's new certification—at no cost?

If you're not SHRM-certified, but have a valid HR generalist certification (including: PHR, SPHR, GPHR, HRBP, HRMP, IPMA-CP) which you obtained by January 31, 2015, you are eligible for SHRM's new certification—at no cost to you—by completing the Online Tutorial Pathway before December 31, 2015. Visit www.shrmcertification.org/pathway to start this process, or e-mail shrmcertification@shrm.org for more information.

Linda Browder will speak about her Hill visit at November's general membership meeting. She will be informing us on hot HR topics from the Hill. See you at the meeting!

SHRM Foundation

giveaway!

At our next meeting you can purchase tickets  for our SHRM Foundation giveaway. Please help the future of HR with your purchase and have the opportunity to win an amazing prize.

Proposed Board Members for 2016 Montgomery SHRM Board Members

President
Membership
Treasurer
Programs
Secretary/Wellness
Webmaster
Newsletter

Mike Polis
Andrea Jordan, PHR
Larissa Southey
Bonita Heartsill, PHR
Tara Gibson, PHR
Tara Langlely
Dee Cook, PHR

Core Leadership Areas

Government Affairs
SHRM Foundation
Certifications/College Relations
Workforce Readiness
Community Services
Diversity

Matt Cox, SPHR
Dr. David Hoover, SPHR
Paula Barlow, SPHR
Carol Silas Smith, SPHR
Becky Ellis, PHR
Tamela Selmar-Burks

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Tara Langlely
Michaela Hutcheson

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Rich Lewis