




fei®

financial executives
international

FEI Houston Scholarship Foundation

**PROUDLY SUPPORTING ACADEMIC HONORS DAY
ESTABLISHED 1970**



Success isn't
just what you
accomplish in
your life, but
what you inspire
others to do.

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Dear FEI Houston Scholarship Foundation Supporter,

Fifty years ago, in 1970, the Houston Chapter of Financial Executives International (FEI Houston Chapter), a prestigious organization of senior-level financial executives, recognized that certain high-performing college students were abandoning their studies around their senior year due to financial hardships. Most academic scholarships covered the first year or two of studies, but funds became much more limited halfway through students' degree programs. The FEI Houston Chapter established a scholarship program for deserving, at-risk finance and accounting majors in their junior year at twelve Southeast Texas-area colleges and universities.

The first twelve scholarships, awarded in 1970, were \$200 each. Today, twelve \$5,000 scholarships are annually awarded to high-achieving students nominated by their deans. Students must demonstrate academic excellence, leadership skills, community service and financial need.

The scholarships are awarded at the FEI Houston Chapter's Academic Honors Day, a premier event in the Houston business community hosted by a local business. The students, their professors and deans are treated to a site visit at the host business, where they interact with successful recent graduates working at Houston companies and meet senior financial executives. It all culminates with an FEI Houston Chapter formal dinner at a stellar Houston venue. Lifelong relationships are formed among the students, businesses, FEI Chapter members and deans, often resulting in internship and full-time employment opportunities for the scholarship recipients.

The FEI Houston Scholarship Foundation is currently the only standalone scholarship foundation of any Financial Executive International chapter in the United States, reflecting the FEI Houston Chapter's long-term commitment to serving at-risk finance and accounting students.

The Foundation is grateful for the support it receives as it provides financial assistance to these impressive students and future financial leaders.



Mark Fehrs Haukohl
Chairman, Board of Directors
FEI Houston Scholarship Foundation, Inc.
Past President
FEI Houston Chapter

Lewis Madsen

Accounting Manager, Houston Rockets

Graduated Stephen F. Austin State University,
GPA 3.91

Raised with a younger sister by a single mother in Hemphill, Texas (population less than 1,300), where he worked at Dairy Queen throughout high school, Lewis Madsen grew up with big city aspirations guided by his desire, drive and determination to succeed. His ambition steered Lewis to the closest avenue (and closest university) to a brighter future, Nacogdoches, Texas. With the assistance of federal Pell Grants, Lewis enrolled at Stephen F. Austin State University and majored in accounting. Struggling financially throughout his college career, Lewis did not waver. He maintained a 3.5 GPA, received a prestigious internship at Deloitte and continued to demonstrate to his professors, deans and advisors his perseverance to achieve what no one in his family had previously done. Not only was Lewis the first to attend and graduate college in his family, he would also surpass his own goals and continue on to receive his master's degree with a 3.91 cumulative GPA in accounting.

Due to his palpable commitment, Lewis was recognized and nominated by Dr. Treba Marsh, Director of the Gerald W. Schlieff School of Accountancy at Stephen F. Austin State University and was awarded the FEI Houston Scholarship Foundation scholarship during his third year of university.

"I was thrilled that I was awarded the FEI Scholarship especially as a Stephen F. Austin State University student. There's no denying that Stephen F. Austin State University is a smaller and lesser known school. I was recognized for my hard work and diligence alongside kids from larger more visible universities. We are now all on the same, equal playing field."





“I still feel honored to be acknowledged as an accounting student that was selectively identified as someone who WAS going to go the distance!”

“I had no financial mentor from whom to seek guidance. Education was my only avenue. Ongoing interaction and mentorship with FEI members has been invaluable.”

ANIL CHANDRY

Senior Vice President,
Corporate and Institutional Banking,
PNC Financial Services
FEI Houston Scholarship recipient,
University of St. Thomas

Mission and Goals

The mission of the FEI Houston Scholarship Foundation (the Foundation) is to sustain and strengthen the financial viability of the FEI Houston Chapter Academic Honors Day Program, which provides student opportunities for recruiting, mentoring and business exposure. The Foundation awards non-discriminatory, need-based scholarships to high caliber accounting and finance students who can be future financial leaders and who attend Southeast Texas accredited universities and colleges.

The Foundation's goal is to establish a strong financial base in order to ensure that the scholarships may be awarded in perpetuity. Our goal is to become a fully self-financing organization with a financial corpus of funds, sufficient to award in perpetuity, twelve scholarships in a minimum amount of \$5,000; \$60,000 every year. The objective is to create an investment portfolio while primarily utilizing investment earnings to fund all scholarships.

Fast Facts

Over 80%

OF SCHOLARSHIPS
ARE ANNUALLY AWARDED TO
MINORITIES AND WOMEN

NUMEROUS SCHOLARSHIPS
HISTORICALLY AWARDED TO
1st generation
COLLEGE STUDENTS

OVER
\$1,400,000

CONTRIBUTED BY FEI
CHAPTER MEMBERS
AND OTHER DONORS

Fortune 500

CORPORATE DONORS

MENTORING AND
SCHOLARSHIP
AWARDS TO OVER

520 students

50th anniversary

OF FEI HOUSTON CHAPTER
ACADEMIC HONORS DAY
(1970-2020)

**“At Risk”
scholarships**

AWARDED AT 12 SOUTHEAST-
TEXAS UNIVERSITIES
AND COLLEGES

STUDENT G.P.A.S
RANGE BETWEEN

3.5 to 4.0

Supporting Strong

Between 2004 and 2019 the Foundation has received contributions from a broad array of individuals, corporations and foundations approximating \$1.4 million. 100% of Foundation board members have annually contributed along with a substantial number from the general membership. Currently the twelve scholarship recipients each receive \$5,000 for a total annual Foundation award of \$60,000. The Foundation's strong liquid balance sheet signals the deep commitment of both the Foundation and the FEI Chapter membership to support deserving finance and accounting students.

SCHOLARSHIP RECIPIENT STATISTICS 2004—2019

TOTAL NUMBER OF AWARDS

184

AVERAGE OVERALL GPA

3.8

FINANCE MAJORS

76 (41.3%)

ACCOUNTING MAJORS

87 (47.3%)

DUAL MAJORS

21 (11.4%)

ADVANCED DEGREES

64 (34.8%)

FEMALE STUDENTS

112 (60.9%)

MINORITY STUDENTS

153 (83.2%)

Majority of all accounting majors
went on to sit for the CPA exam

Eligible Universities and Colleges

The Foundation is proud to partner with twelve universities and colleges in Southeast Texas.

- **Houston Baptist University**
- **Lamar University**
- **Prairie View A&M University ***
- **Rice University**
- **Sam Houston State University**
- **Stephen F. Austin State University**
- **Texas A&M University**
- **Texas Southern University ***
- **University of Houston – Central Campus**
- **University of Houston – Clear Lake**
- **University of Houston - Downtown**
- **University of St. Thomas**

(*) denotes HBCU (historically black colleges and universities)



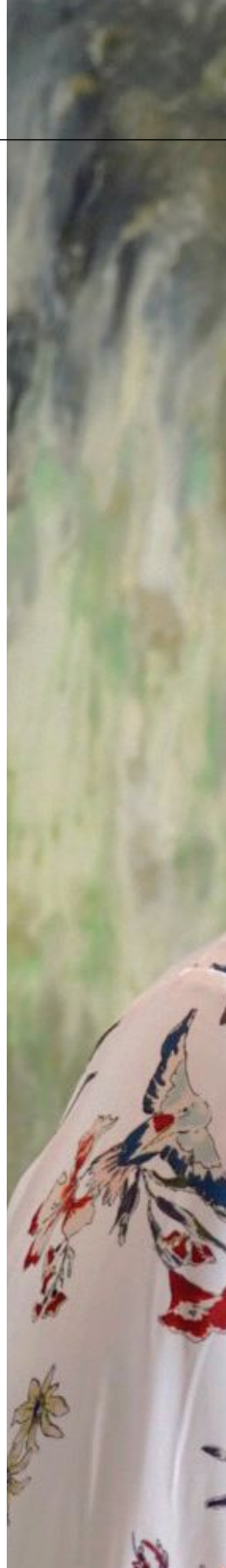
Sabrina Griffin

Graduated Texas Southern University, GPA 3.91

For Sabrina Griffin, there is no stopping; there is no challenge too great; there is no problem that does not have a solution. There simply is no obstacle that Sabrina can't overcome, especially when she makes up her mind and focuses on how far and high she wants to go in life. The possibilities are endless for this youngest sibling of four children with an ex-military postal worker father and mother who was a daycare provider. In December 2019, Sabrina was the first in her family to graduate college.

Working over forty hours a week during her entire college career, while maintaining a 3.91 GPA, took nothing less than determination. A member of the Honors College and National Association of Collegiate Scholars, Sabrina's reputation around campus for her academic excellence and willingness to help fellow classmates by tutoring incoming freshmen and sophomores, led to her nomination and ultimate award of the FEI Houston Scholarship for Texas Southern University.

After receiving her BBA in accounting from Texas Southern University, her dedication and never-ending preparation to her chosen field and course of study is demonstrated as she looks forward to attending graduate school while considering an extended job offer at Hilcorp Energy Company. She is presently a CoOp student intern in the Internal Financial Reporting Department. "I currently work on the 11th floor of Hilcorp. My goal is to work on the 25th floor, where the executives are." There's no doubt she's headed in that direction, if not higher.





“I worked hard for my GPA! FEI not only recognized my school, Texas Southern University... but ME, Sabrina Griffin! All the work I’ve done to this point wasn’t the only thing acknowledged by FEI and my Dean, but the future they see in me.”

Academic Honors Day and the FEI Houston Chapter

The FEI Houston Chapter presents Academic Honors Day, which is held annually in conjunction with the February FEI Houston Chapter meeting. Academic Honors Day is hosted by a prominent Houston organization in cooperation with the FEI Houston Chapter. Previous hosts include **Baker Hughes, Bio Houston, Exxon Mobil Corporation, CenterPoint Energy, Daiken, Federal Reserve Bank, Greater Houston Partnership, Gulf States Toyota, Halliburton, Houston Astros, The Texas Medical Center, Houston Port Authority, MAXXAM, Sam Houston Race Park, Service Corporation International** and **Shell Oil Company**.

Key objectives include providing a business experience and networking opportunity for students to connect with senior finance leaders. Similarly, FEI grants local businesses and professional services firms exposure to top accounting and finance students, reinforcing the presence of FEI in the community and assisting in providing accounting and finance deans and senior faculty a platform to increase their exposure to Houston business leaders. Student mentoring is also an important element and benefit of Academic Honors Day.

Academic Honors Day typically commences with a lunchtime reception to allow students, faculty, sponsoring organizations and FEI Houston Chapter members to become acquainted. The afternoon includes a facilities tour, presentations from the host related to their industry and a panel discussion typically addressing current finance and ethical matters. The program provides an excellent opportunity for students to learn about specific industries and businesses with their unique challenges, as well as meet industry leaders in the students' chosen profession. Scholarship recipients and their faculty sponsors are recognized in the evening at the FEI Houston Chapter meeting and dinner.





Consistent with FEI's mission to advance the success of senior-level financial executives, their organizations and the profession, the FEI Houston Chapter aims to provide its members insight on how to work smarter and influence advocacy. FEI's programs supply the tools to advance the profession through ethical leadership.

The FEI Houston Chapter is one of the most active FEI chapters in the country, with over 250 members. Dinner, breakfast, and luncheon networking and professional development sessions are held throughout the year. Members can earn continuing professional education credit by attending chapter events.



Maritza Santos Rodriguez

Graduated with a Master's degree University of Houston, GPA 3.91

Born in Wichita, Kansas, and raised as an only child in Baytown, Texas, Maritza's earliest memories related to her immediate and unwavering surroundings, REFINERIES. Fresh out of the University of Houston, C.T. Bauer College of Business with her master's degree in accounting, it's no fluke that Maritza Rodriguez has been retained by the Controller's Division of Baytown's largest employer, ExxonMobil Corporation. Having been raised by a refinery worker stepfather and now engaged to a fellow ExxonMobil field operations technician, Maritza saw big business in her own backyard. Where others saw production facilities and chemical plants, Maritza saw nothing but numbers in the background. She grew up being comfortable in the world of oil and gas.

Displaying academic excellence with a 3.91 GPA, Maritza is the first person in her family to attend and complete college. Exhibiting a passion for leadership having served as President of the University of Houston Internal Audit Student Association, she faced immense challenges with three full-time internships at ExxonMobil, BMC Software and Grant Thornton LLC while completing her degree. Maritza never doubted her professional trajectory. Regardless of returning to ExxonMobil's Baytown campus or adjusting to one of its global operations, Maritza will be right at home—only instead of gazing upon refineries, her landscape will be the world of numbers that comprise the industry.



**“Being
recognized for
all the hard
work I put in
is gratifying.
Knowing
that FEI
believes in my
performance
and in my
future is the
true reward.”**

About Financial Executives International, The United States Organization



FEI Houston Scholarship Foundation recipients and mentors at Academic Honors Day.

Financial Executives International (FEI) is the leading advocate for the views of corporate financial management. Its more than 10,000 members hold policy-making positions as chief financial officers, chief accounting officers, controllers and treasurers at companies from every major industry. FEI enhances member professional development through peer networking, career management services, conferences, research and publications. Members participate in the activities of more than 65 chapters in the United States.

FEI's mission is to advance the success of senior-level financial executives, their organizations and the profession. FEI strives to be globally recognized as the leading organization for senior-level financial executives. Since 1931, FEI has been connecting members through:

- **Interaction:** Providing local and international forums for connecting with peers;
- **Information:** Providing insight to assist with informed business decisions;
- **Influence:** Providing authoritative representation for members' interests; and
- **Integrity:** Providing the tools to advance the profession through ethical leadership.

Student Award Criteria

The FEI Houston Scholarship Foundation coordinates with university and college representatives to identify candidates for the scholarships and to confirm student eligibility. Students are recommended by senior faculty of the universities and colleges; then approved by the respective deans. Final approval is made by the FEI Houston Scholarship Foundation Board of Directors. All awards are non-discriminatory.

Specific award criteria are:

- Accounting or finance major;
- At least Junior year;
- Demonstration of financial need;
- Demonstration of an active interest in the finance profession;
- Grade point average of 3.5 - 4.0 or better in major courses and overall studies;
- Active participant in campus and community service;
- Not a current recipient of other significant scholarships; and
- Permanent resident or citizen of the United States.

FEI Houston Scholarship Foundation Donor Honor Roll CUMULATIVE GIFTS AND PLEDGES

In recognition of their commitment to excellence and in support of OUR MISSION, a heartfelt *THANK YOU* to all of the following individuals, foundations and companies for their generous gifts.

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GIFTS \$100,000 AND UP
ExxonMobil Corporation
FEI Houston Chapter
Bruce Misamore

CHAIRMAN'S CLUB
GIFTS \$50,000 AND UP
Halliburton
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PRESIDENT'S CLUB
GIFTS \$25,000 AND UP
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GIFTS \$1,000 AND UP
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Ernest Pekmezaris
Daniel Pickering
Terry Sanford
Robert Schmitz
Marlise Skinner
Jim Spanier
Mark Vise

Board of Directors, Officers and Committee Members

The Foundation is comprised of a dedicated group of Houston-area business leaders passionate about supporting at-risk students pursuing degrees in accounting and finance. These leaders volunteer their time to support the Foundation and are focused on best-in-class governance policies and transparency. Examples include maintaining very low administrative expenses, facilitating an annual audit, maintaining a risk-appropriate investment policy and executing annual conflict of interest statements for each of the members. With a commitment to *full* transparency for all donors, all of the Foundation's financial statements, audit reports and governmental filings are readily available online for anyone to review.

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The Coastal Corporation, Good Samaritan Foundation

Tony Nolte

Shell Oil

(*) denotes past FEI Houston Chapter President

Opportunities to Support the Foundation

Fundraising is critical to support the student scholarships. The Foundation has historically received tax-deductible donations from both individuals, businesses and charitable foundations. Much of the historical support has come from the founder, the FEI Houston Chapter, as well as its individual and corporate donors.

In addition to providing significant educational and career opportunities for scholarship recipients and supporting the advancement of the finance profession, potential benefits of support include:

- Published recognition in FEI Houston Chapter literature along with Foundation printed materials and websites;
- Access to deans and other faculty at the eligible colleges and universities for employee recruiting purposes;
- Perpetuity scholarship naming opportunities are available for cumulative donations of \$100,000 or more.

Many types of donations are welcome, including one-time donations, multi-year commitments, corporate matching, endowments, planned giving and QCD (Retirement Fund Withdrawal). Gifts of stocks and securities are encouraged.

All contributions make a great difference. Members of the Foundation would be pleased to meet with all prospective donors to discuss further options.

Contact Information

The Foundation is a 501(c)(3) nonprofit organization. More information is available on its website, **feihoustonfoundation.org**. The Foundation is a proud nonprofit partner of Donor Houston/Guidestar, which can be accessed at **donorhouston.guidestar.org**. On these sites are posted current and historical documents, such as annual audited financial statements, income tax returns, IRS determination and advanced ruling letters, articles of incorporation, information about the Board of Directors, financial forecasts and strategic plans. For more information, please contact The Foundation in any of the following ways:

Phone: (713) 839.0808

Email: info@feihoustonfoundation.org


Mail: P.O. Box 32 Bellaire, Texas 77402

TO DONATE:

Online: <https://feihoustonfoundation.org/catalog.php>

By check: Payable to: FEI Houston Scholarship Foundation





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