



*Siegfried*<sup>®</sup>

# FEI SUMMIT REPORT

ANNUAL FINANCIAL LEADERSHIP SUMMIT

May 2019 | Orlando, FL

[Financial Executives International](#) (FEI) recently held its annual Financial Leadership Summit in Orlando, Florida. The theme of this year's summit was *Inspire Your Tomorrow*.

Built on FEI's tradition of connecting talented members with invaluable resources, the Financial Leadership Summit brings together the best and brightest to learn what it takes to be an effective financial leader.

The following highlights were prepared by some of the best and brightest Siegfried leaders attending the summit and focus on the most compelling sessions.

## DAY ONE

### ME TO WE: Making Doing Good, Doable

**Speaker:** [Craig Kielburger](#)

Craig Kielburger is a speaker, entrepreneur, and founder of organizations dedicated to the power of [WE](#), a movement of people coming together to change the world.

Craig's message is to "make doing good doable" and he influences his charities and others to operate in a "development" model of giving, rather than a "handout" model because he feels that this is more sustainable and impactful.

This was illustrated by the story Craig told of [Jeff Skoll](#), co-founder of eBay, who gave away \$1 billion. Jeff was frustrated that he could not directly measure the impact of his donations, and this frustration led him to channel his funds into a production company, which produced the film "[An Inconvenient Truth](#)."

To illustrate the power of people coming together to change the world, Craig spoke of his time building a school in a remote Kichwa-speaking village. Delays in construction meant that the school would not be completed for months. The Chief of the village yelled

"Minga!" and everyone in the village and surrounding villages dropped what they were doing and completed the school in two days. Craig was disappointed to learn that there is no English word for "Minga," however he encourages people and organizations to find their own word to bring everyone together in pursuit of accomplishing something for the common good.

Key takeaways from Craig's presentation:

- Try to see problems as business opportunities. This is how Jeff Skoll, co-founder of eBay thinks.
- Team spirit is built by doing physical service work for others, such as building a school.
- We do not help each other because we are a community; rather, because we help each other, we are a community. – Chief of the Kichwa-speaking tribe

## DAY TWO

### Trust Your Hustle

**Speaker:** [Anthony Trucks](#)

Anthony Trucks is a former NFL player known for overcoming adversity, or "Shift" as he calls it. Anthony lived in an orphanage until age 13 when he was adopted. Now, he helps people take Shift seriously in their lives to make great Shift happen.

According to Anthony, a Shift moment is when we are forced into making a decision. One of the most fundamental decisions we must make in these moments is whether we are going to ride the wave of the Shift that has occurred, or succumb to the forces at play and struggle to thrive. Anthony reinforces that we are completely in control of this decision and advocates for developing a metaphorical tripod to hold you up in times of Shift.

The key elements of the tripod are:

- **Tools:** What tools do you have at your disposal to deal with the newly presented situation?
- **Technique:** How can you use the tools available to you to thrive in the Shift that is occurring?
- **Technician:** This is you. Anthony advocates for “solidifying the technician” in mind and body so that you have what it takes to use the tools with the proper technique when the Shift is occurring.

Key takeaways from Anthony’s presentation:

- Own your Shift. Do the things or actions that the person you want to become is doing.
- Make Shift happen. Great returns only come from great investments.

## The Art of Leadership

**Speaker:** [Erik Wahl](#)

Erik Wahl is a renowned graffiti and performance artist, motivational speaker, and best-selling author. Erik allowed his self-worth to be tied to his net worth and therefore had problems when he lost everything in the financial crisis. He began to paint because he didn’t have money for anything else. Painting is a creative process that activated the right or creative side of his brain and the solutions to his financial problems started to become clear when viewed with this new perspective.

Erik illustrates that as adults in a high-stakes environment (which requires complex thinking to navigate), we are trained to be logical, risk-averse, and busy. The corporate structure is set up to reward these traits. This is in contrast to childhood where creativity and daydreaming are encouraged and abundant. With this in mind, Erik poses the question: What is a creative

idea worth in your organization? Is it worth taking a risk?

To illustrate that it pays to take risks, Erik randomly selected a volunteer from the crowd and told him that he was going to have to perform a “[Fear Factor](#)” style challenge in front of the audience. Once the volunteer had internalized this, he was given the opportunity to delegate the challenge to someone else. He picked his boss out of the crowd. When the boss came up to the stage, Erik handed him an envelope containing his challenge. However, when the envelope was opened, the boss found a letter from Erik that explained the piece of art that he had just created on stage would be gifted to the holder of the letter. The boss got to keep the art and was rewarded for taking a risk and getting up on stage. Sometimes it pays to take risks!

Key takeaways from Erik’s presentation:

- FEAR (False Evidence Appearing Real) can paralyze our thought processes.
- Being analytical is necessary, but not sufficient on its own. Slow down and build in an emotional element to your strategy.
- Find, hire, and nurture dreamers that **DO**. Erik believes this is the future of business success.

Everything seems easier with a little inspiration! We encourage you to share this recap with anyone who may find it relevant and interesting. Don’t forget to sign up for our email list to receive the latest information from us.