



*The Municipal Bond Women's Club of New York*

Betty Infantes, President  
Jaime Sussman, Vice President

Susannah Page, Secretary

Nancy M. Donato, Treasurer

THE  
MUNICIPAL BOND  
WOMEN'S CLUB  
OF  
NEW YORK

ANNUAL REPORT  
2014

## **Notice of Election of Officers**

September 2013

In accordance with the Constitution and By-Laws of the Municipal Bond Women's Club of New York, the current Officers and Board Members serving as the Nominating Committee unanimously nominated the following members as Officers and Governors for the 2013-2014 term of office commencing September 2013.

<b>President</b>	Betty Infantes
<b>Vice President</b>	Jaime Sussman
<b>Secretary</b>	Susannah Page
<b>Treasurer</b>	Nancy Donato

### **Board of Governors**

Laurie Cochin  
Heather Grzanka  
Susan Kelly  
Colleen Meehan  
Ivone Parra  
Theresa Werner

## Minutes of the Annual Meeting

The 65<sup>th</sup> Annual Meeting of the Municipal Bond Women's Club of New York was held on October 2, 2013 at Harry's Italian Downtown for a third year. The food was delicious, the ambience of the brick-walled dining room was warm and inviting, and as always at any Harry's venue, the service was excellent and accommodating.

We had a record turnout of 29 attendees at the Annual Meeting event. We enjoyed each other's company along with a great menu at Harry's Italian. We welcomed in Susannah Page as our new Secretary and Heather Grzanka as our newest Board Member. It was also so nice to have some new faces mixed in as we continue to expand membership.

The Club's mission for the upcoming year is to sponsor events to maintain membership, to promote member participation in our charitable and social events, and to continue to recruit new members into the Club. The appointment of Susannah Page in the role of Secretary this year has been a great addition to the Officer Slate. In addition to maintaining the MBWCNY LinkedIn group, Susannah will work towards a remedy for our antiquated website.

Respectfully submitted,

Betty A. Infantes

## President's Report

September 2014

Dear Members,

MBWCNY hosted a few fun, social, and charitable events in 2013 and 2014. We were successful in expanding our activities this year to include a happy hour networking event which was well received by new and prospective members. We look forward to hearing more fresh ideas from our Board and Club members.

In addition to the Annual Meeting on October 2, 2013, the MBWC Board "met" mostly via conference calls and instant messaging/emails because of busy, conflicting schedules and in order to save expenses.

1. September 17, 2013: The Board approved changes to our Annual Dues letter. The letter highlighted what the MBWCNY endeavors to do with members' dues, as well as the other benefits of membership.
2. September 30, 2013: The Board decided to continue our long-running tradition of sponsoring an advertisement in the 2013 Veterans Day Parade Commemorative Newspaper.
3. October 2, 2013: Annual Dinner
4. October 30, 2013: Board Meeting at Naples 45.
5. December 4, 2013: MBCNY 81<sup>st</sup> Annual Holiday Party
6. December 16, 2013: The Board began to coordinate the MBWC wine event.
7. January 7, 2014: The Board began to coordinate the Goodwill Valentine's card making event.
8. January 9, 2014: The Officers began the process of trying to update our existing website and also considering the option of creating a new website.
9. January 29, 2014: UWVC- Goodwill Valentine's Caravan Event
10. March 17, 2014: The Board discussed via email the status of our updating the website, considering moving to a separate tab on the MBCNY website, hiring an

outside firm to create a new website as well as the status of our pages on LinkedIn and Facebook.

11. March 19, 2014: Wine Tasting event at Bahr Che
12. April 7, 2014: The Board met via conference call to discuss several topics. The idea of switching from our own website to a link on the new and improved MBCNY site. Suggestion to join MBCNY for their summer outing was discussed. The outing would include a cocktail party on June 11<sup>th</sup> and golf outing on June 12<sup>th</sup> at Old Oaks Country Club in Westchester. For non-golfers, a tennis package including access to the pool will be offered. Initial thoughts were entertained on hosting our own Holiday party.
13. April 15, 2014: The Board began to coordinate the happy hour networking event
14. May 19, 2014: Susannah Page contacted Bonnie Tessler who developed a website for the Northeast Women in Public Finance. Bonnie is willing to give us some ideas on how to get ours pulled back together or the cost of building a new site.
15. June 11-12, 2014: MBCNY Summer Outing
16. July 1, 2014: The Board voted to engage Bonnie Tessler to create a new website using Wild Apricot and set a date for our Holiday party on November 19<sup>th</sup>. Most of July and August were spend sorting through old content and providing information and pictures for new site as well as setting up new Gmail and Paypal accounts.
17. July 15, 2014: Happy Hour event at Pranna.
18. September 8, 2014: The Board voted to reinstate the current officer slate for another year. Also, plans for the Annual Dinner were finalized including a change in pricing for a nominal charge for honorary members. Announcement of the new website launch.

## **Summary of Events 2013-2014**

The Board discussed via email the status of our updating the website, considering moving to a separate tab on the MBCNY website, hiring an outside firm to create a new website as well as the status of our pages on LinkedIn and Facebook.

**Board Meeting** Six officers/board members were in attendance. We enjoyed yummy pizza and discussed several items of business. Status of paid members, more than half of our members had submitted dues at that time. Nancy and Betty will follow up with “friendly reminders” to those who have not paid yet. We made plans to reach out to guests who have attended our events with an application for membership. The issue of the MBWC website was discussed including access to the old site. The calendar of events for the year was sketched out including a reminder to members to bring toiletries to the Holiday Party on December 4<sup>th</sup>. Plans for the Goodwill Valentines card making Event will be made for a date in late January to be held at Jefferies. Jaime will look into having another wine tasting event in January or February. MBWCNY will join MBCNY for Annual Spring Outing in June. We will return to Harry’s Italian in October for the Annual Dinner. MBWCNY will return to hosting our own Holiday Party.

**MBCNY 81<sup>st</sup> Annual Holiday Party** Colleen Meehan suggested partnering with the MBCNY for our holiday celebration. The Board agreed to join in this very auspicious event. It was great to see everyone last night. The Union League Club was a perfect venue for some much needed holiday cheer and quality time with our gal pals. For those who could not make it, you missed a very exciting announcement. Colleen will be the next President of the Muni Bond Club! Congratulations Colleen! You have our support all the way.

**Goodwill Valentines (4<sup>th</sup> Annual)** was held on January 29, 2014. Marleen Levi, Betty Infantes chaired this event. A group of 16 members and guests gathered together over dinner and refreshments to create Valentine’s Day cards for our veterans and wounded warriors. The cards were hand-delivered by Marleen and the Goodwill caravan of the United War Veterans’ Council to our troops in Walter Reed National Military medical Center at Bethesda, Maryland. The cards were appreciated and admired by all who received them. The cards were carefully selected for baskets that went to wounded warriors. Special thanks to Marleen Levi for bringing this wonderful event to MBWC’s attention and to Jefferies & Company for hosting this event. We enjoyed quality time with friends while contributing to a very worthwhile cause. We hope our heartfelt and handmade Valentine wishes help to brighten the day for our wounded military members and their families!

**Wine Tasting Event** held on March 19, 2014. Jaime Sussman was kind enough to organize a lovely evening at Bahr Che on Astor Place. Attendees enjoyed a tasting of red and white wines as well as some light snacks. There were 13 members and guests in attendance including a mix

of long-time associations and a few new faces which created a perfect venue for networking. We all enjoyed some much needed relaxation and camaraderie!

**The MBCNY Annual Summer Outing** was held on June 11-12, 2014. It was a huge success with over 400 muni participants across the two day event. The club received positive feedback for it's second "two day" outing which included a Rooftop Cocktail party at Monarch and a Golf Outing at Old Oaks Country Club in Purchase, NY. The weather cooperated for the all-outdoor events and members and guests were able to catch up with old friends and network with new contacts.

**Happy Hour Event** was held on July 15, 2014. Jaime Sussman organized a wonderful event. There were over 20 members and guests in attendance. The happy hour format was conducive to networking with more attendees as opposed to a sit down dinner event. Two attendees stood out in the crowd. Pam Paul of Drexel Hamilton brought a colleague to the event. Kimberly Alonzo shared interesting insights of her military career and job seeking experience. Maxine Liu of Fitch also attended. Both women are new to the Municipal business and their energy and fresh perspective would be an excellent addition to our group. I have reached out to both with application for membership.

Please accept a heartfelt "Thank you" from the Municipal Bond Women's Club of New York for the generous donations received for our raffles and fundraisers. In addition to the United War Veterans' Council, gifts have been given to Women in Need. These organizations help and support people, especially women, facing what may be insurmountable challenges in their lives. All these organizations provide a source of hope and comfort in a time of need, and I'm incredibly proud of our Club's involvement.

Congratulations to our new, incoming Officer in the role of Secretary, Susannah Page. The other officer positions were held by the existing slate for the 2013-2014 term including Nancy Donato as Treasurer, Jamie Sussman as Vice President and Betty Infantes as President. With the exception of one new board member, Heather Grzanka, all of our Board Members are continuing their service.

Special congratulations to Laurie Cochin who retired from J.P. Morgan on May 22, 2014. We are lucky enough to retain her services as a Board Member.

Special thanks to Susannah who introduced our group to a website designer named Bonnie Tessler. Bonnie has been creating sites tailored to client's tastes and needs since 2001 mainly for individual practitioners and small businesses. Bonnie guided us through the process and made sure that we were pleased with the final product. While it was a sizeable expenditure for our club, we believe it was a vital investment. The new site, <http://mbwcnny.wildapricot.org/> was launched in September 2014 and helps up to maintain membership, payment for dues and events, communication of announcements and upcoming events.

Much appreciation is extended to the current slate of Officers and Board members for the commitment, support, and many hours spent tending to the goals of our mission. I am truly grateful.

As a final note, the Club was successful in adding four new members during the 2013-14 year. We welcomed Mary Gordon from Ipreo in September 2013 and Kelly Borsella from Jefferies in November of 2013. Dee Graf and Jo Ann Mugavero both from UBS joined in September 2014. Please continue to reach out to the municipal bond and financial services communities to encourage membership applications, so we can continue to support each other, network effectively, and give back/pay it forward through our community service and charitable fundraising efforts.

Respectfully submitted,

Betty Infantes  
President



## *The Municipal Bond Women's Club of New York*

**Betty Infantes, President**  
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**Susannah Page, Secretary**  
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October 1, 2014

Please find below the records of events for the 2013/2014 Club Year.

<b>Balance October 1, 2013</b>			<b>2,767.95</b>
<b>Event/Expense</b>	<b>Revenue</b>	<b>Expense</b>	<b>Balance</b>
Bank Fees 10-8-13 to 8-4-14		10.10	2,757.85
Annual Dues 2013-2014	2,400.00		5,157.85
Interest earned 10-24-13 to 9-24-14	2.88		5,160.73
Veteran's Day Acknowledgement Donation Oct 2013		250.00	4,910.73
Annual Dinner at Harry's Italian	400.00	1,800.00	3,510.73
Annual Dinner raffle proceeds	455.00		3,965.73
Women in Need donation from raffle proceeds		455.00	3,510.73
Reimbursement for Betty Infantes' gift		98.00	3,412.73
Reimbursement for Board Dinner		208.60	3,204.13
Wine Tasting at BarChe	650.00	530.00	3,324.13
Robert J. Varsalona- Tax Return prep 2012 and 2013		750.00	2,574.13
Reimbursement for Laurie Cochin's retirement gift		54.43	2,519.70
Reimbursement for Jaime Sussman related to happy hour event		104.00	2,415.70
Balance on October 1, 2014			2,415.70

Respectfully submitted,

Nancy M. Donato  
Treasurer  
Municipal Bond Women's Club of New York