



OUTAGAMIE COUNTY EXECUTIVE
Thomas M. Nelson
320 South Walnut St.
Appleton, WI 54911
920.832.1684
thomas.nelson@outagamie.org

October 24, 2023

To the Honorable Outagamie County Board of Supervisors

Ladies & Gentlemen:

Due to the sudden departure of the Finance Director it is with great pleasure that I nominate Trenten Woelfel for appointment as Finance Director.

Trent has an MBA in Finance, has served 6 years as County Treasurer and comes with a wealth of financial expertise from years of experience.

Please find supporting documents enclosed for your reference. Your support in confirming this appointment is appreciated. Thank you.

Sincerely,

Thomas Nelson

cc: Trent Woelfel

Outagamie County Application for Executive Appointment

Name: Trenten J. Wolfel

Address: [Redacted]

Home Phone: () _____ Work Phone: [Redacted] Cell Phone: [Redacted]

E-Mail Address: [Redacted]

Would you like agendas and minutes emailed to you? Yes ___ No

Do you want your email address given to the general public? Yes ___ No

Present Employer/Position: Outagamie County

Previous Employer/Position: Associated Bank

Educational Background: MBA, Concentration in Finance

Present and Previous Public Service Involvement: (other commissions, committees and years of involvement)

Comments:

Signature: Trenten J. Wolfel

Date Submitted: 10/19/2023

OUTAGAMIE COUNTY DISCLOSURE
IN COMPLIANCE WITH RESOLUTION 46—1974 AND ORDINANCE C-2010-11
AND CHAPTER 2, SECTION 2-424 – 2-426 OF THE OUTAGAMIE COUNTY
CODE OF ORDINANCES

The purpose of this Disclosure Statement is to make full disclosure of all potential or actual conflicts of interest. Conflicts of interest occur when the personal interests, financial or otherwise, of a person actually or potentially interfere with the person's professional obligations to and/or the best interests of Outagamie County.

NAME (LAST)	(FIRST)	(MIDDLE)	DAYTIME TELEPHONE NUMBER
Woelfel	Trenten	J	[REDACTED]
MAILING ADDRESS	STREET	CITY	STATE ZIP CODE
[REDACTED]			

POSITION OR CAPACITY WITH OUTAGAMIE COUNTY (now held or seeking):

Treasurer → Finance Director

PRINCIPAL EMPLOYER(S) NAME

Outagamie

ADDRESS

320 S Walnut St, Appleton, WI 54911

SOURCE OF INCOME IN EXCESS OF \$1,200 PER YEAR (List all sources or anticipated in excess of \$1,200/year). List any interest in any business, contract, lease or item of value, the nature and extent of such interest, holding or employment which may involve a conflict of interest or potential conflict or ethics problem in conducting county business.

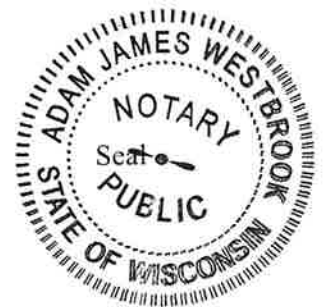
Lakeland University

I, Trenten J Woelfel currently serving or will be serving Outagamie County in the capacity of Finance Director certify that I anticipate no income from any other source to be in conflict with the county ethics code nor do I have any holdings not disclosed which would be in conflict or a potential conflict of interest or violation of the Outagamie County Code of Ordinances, Chapter 2, Section 2-424 – Section 2-426, Resolution 46—1974 and Ordinance C-2010-11.

Trenten J Woelfel
 Signature

Subscribed and sworn to before me this 14 day of October, 2023.

[Signature]
 Notary Public
 Commission Expires: Perm



TRENTEN J. WOELFEL, MBA

Dear Thomas,

I feel my service as County Treasurer would bring a lot of relatable experience to the Finance Director position. To summarize, I have experience with the County's budget process, accounting policies, supervising, contract review, logical decision making, presenting to boards, specialized software systems, improving processes, and I have a good rapport with the staff. A combination of my education, professional background, and aspirations to continuously improve makes this transition to Finance Director a logical and exciting next step in my career. Therefore, a promotion to Finance Director would be a great honor and is a great match with my experience as I have outlined for you below:

Your Requirements

Bachelors degree in Accounting, Finance, or Business Administration.

Seven to ten years accounting and financial experience required.

Considerable skill in presenting information and recommendations in a clear and concise manner.

Ability to supervise, assign, and review the work of others.
Ability to make decisions regarding the selection, discipline, and discharge employees.

Proficient in use of Microsoft Office: Word, Excel, Outlook, etc.

Ability to communicate effectively, verbally and in writing with people at various levels both within and outside the organization.

There are additional skills and accomplishments in my background that should be of interest to you. I look forward to discussing how I will enable you to meet your future goals.

Sincerely,

Trenten J Woelfel

Trenten J Woelfel

My Qualifications

Master of Business Administration (MBA), Concentration in Finance, GPA of 3.958.

Over 6 years of management experience as County Treasurer, and over 6.5 years of experience in a highly regulated, fast paced banking environment in mortgage compliance and corporate risk.

As County Treasurer, I have experience regularly reporting to the Finance Committee to provide updates on investments, delinquent property taxes, and foreclosures. I also have experience leading boards as the President of Wisconsin County Treasurer's Association and Appleton Area Jaycees.

Since starting in 2017, I successfully revamped the Treasurer's department after a slew of retirements. I have built a well-oiled team. During that time, we had to work through a PIP that ultimately ended up with a discharge. Efficiencies allowed us to make one full time position a part time position.

Not only do I use Microsoft Office daily, I have also taught Beginning and Intermediate Spreadsheets at FVTC.

As County Treasurer I work with all community populations. I believe in equitable and equal service to all and strive to maintain excellent levels of customer service. I have a good rapport with Finance Committee and departments, ensuring a smooth transition to Finance Director.

TRENTEN J. WOELFEL, MBA

FINANCE DIRECTOR

Identify Process Improvements that Optimize Efficiency by Reducing Waste and Creating Synergies

Motivate colleagues to work collaboratively, achieving productivity improvements that drive significant cost savings while maintaining requirements of law. Meet and exceed goals and deadlines by setting priorities and applying thorough decision making. Adapt to ever-changing environments by having an open mind and analytical, mathematical, and problem-solving skills, with attention to details. Utilize strong communication skills and positive attitude to build strong working relationships with coworkers and business partners from various backgrounds.

Team Player | Change Management | Continuous Improvement | Relationship Management | Reporting

Organization | Budgeting | Leadership | Computer Software Proficiency | Collaboration | Project Management

PROFESSIONAL EXPERIENCE

OUTAGAMIE COUNTY, Appleton, WI

2017 – Present

County Treasurer

- Prepare, track, analyze, reconcile, and forecast Treasurer, Interest Income, and Tax Deed budgets
- Coordinate with auditors and prepare schedules supporting the financial statement and internal control audits
- Present updates on investments, delinquent taxes and foreclosures to the Finance Committee
- Review processes and procedures to enhance efficiency while maintaining appropriate internal controls
- Collaborate between roles and departments to reduce/eliminate redundancies
- Investment Officer for the County's \$200 million portfolio pursuant to Wis. Stats. §59.62 and internal policy
- Manages collection of property taxes pursuant to Wis. Stats. §74
- Oversee delinquent accounts, property seizures, and public sale of tax foreclosures pursuant to Wis. Stats. §75.521
- Manage and oversee daily cash flows and bank wires, ACH and checks for all incoming and outgoing funds
- Collaborate with internal departments, DOR, municipalities to calculate and print all the County's tax bills
- Manage and negotiate bank, brokerage, and other vendor relationships
- Supervise, coach, assign, and review the work of the Deputy County Treasurer
- Provide high level of customer service to the public, other taxing entities, and colleagues
- Review monthly journal entries and accruals in accordance with GAAP and governmental accounting
- Additional duties can be found in review of Wis. Stats. §59.25

Fox Valley Technical College & Lakeland University

2020 – Present

Adjunct Instructor, Appleton and Neenah, WI

- Instructor in the Accounting/Business Department with experience teaching Financial Decision Making, Principles of Accounting, Beginner/Intermediate Spreadsheets, Management Principles, and Personal Financial Management

ASSOCIATED BANK

2010 – 2017

AVP, Senior Financial Intelligence Analyst, Green Bay, WI

2013 – 2017

- Led enhancements for department reports, recommending updates and collaborating with other teams.
- Enhanced efficiency and improved processes by identifying irrelevant and redundant information and presenting enhancements to templates and procedures to newer colleagues.
- Exercised solid judgment while investigating, analyzing, and documenting suspicious account activity behaviors.
- Ran all periodic (daily, weekly, monthly, quarterly, ad hoc) departmental reporting utilizing Oracle database.
- Performed enhanced due diligence on high-risk customers with emphasis on risk evaluation.
- Analyzed suspicious activity and explanation of customer's account variations.

Residential Loan Coordinator, Green Bay, WI

2012 – 2013

- Collaborated with Loan Officers and Underwriters, ensuring regulatory guidelines and closing dates were met.
- Analyzed borrower financial stability by analyzing tax returns, W2s, and pay stubs.
- Managed efficient closing process, ensuring smooth process for customer by communicating file status to loan officers within established guidelines.
- Proved ability to multi-task by managing up to 150 loans at a given time.

Mortgage Document Specialist II, DePere, WI

2010 – 2012

- Increased production and higher employee retention by serving as team lead and trainer on all reviewing procedures.
- Performed final audit of FHA and Fed VA applications before presenting loans to investors.
- Improved procedures for all types of loans by analyzing processes and developing tools used as reference points.
- Prepared and reconciled invoices after approving purchase of correspondent loans.

EDUCATION

- **Master of Business Administration (MBA)**, Concentration: Finance, Lakeland College, Green Bay, WI, 2015, GPA of 3.958
- **Bachelor of Science (BS), Business Administration**, Emphasis: Finance & Accounting, Carroll University, Waukesha, WI, 2011

TECHNICAL SKILLS

Transcendent Technologies | JD Edwards | Nexus (MSB Payment Reporting) | CityView | Tyler Munis | Oracle | MS SQL Server | Microsoft Office: Word, Excel, PowerPoint, and Outlook

VOLUNTEER EXPERIENCE**WISCONSIN COUNTY TREASURER ASSOCIATION (WCTA)**

2017 – Present

Member, Vice President, and President

- Manage and lead general membership and board meetings to identify process improvements, legislative issues, best practices, community needs by interfacing with peers and having diverse speakers for continuous improvement.
- Currently serve on the Executive, Education, Legislative, Technology, Site Selection, and Audit committees.
- Involved with Homeownership Taskforce that brought together a diverse coalition of organizations committed to developing equitable solutions that would improve homeownership and prevent foreclosures.
- Hosted and planned 2022 June WCTA Conference

APPLETON AREA JAYCEES

2013 – 2018

Member, Treasurer, President and Chairman of the Board

- Managed and led general and board meetings to identify community needs by interfacing with peers and community members and managing community projects such as the Appleton Fireworks, Christmas Shopping event, Easter Egg Hunt, CP Telethon, and more.
- Recognized as New Member of the Year (2014) for regularly assisting on key projects and leading various community and individual development projects.
- Oversaw all financials, general ledger, accounts payable / receivable, collections, budgeting, and cash management.

LEADERSHIP FOX CITIES

2018 – 2019

LEADERSHIP GREEN BAY

2015 – 2016

JUNIOR ACHIEVEMENT

2010 & 2015

LITTLE CHUTE HIGH SCHOOL BOOSTER CLUB

2014 – 2018

CERTIFICATION

2014 – 2018

- Certified Anti-Money Laundering Specialist / Association of Certified Anti-Money Laundering Specialists (ACAMS)



HUMAN RESOURCES DEPARTMENT
320 SOUTH WALNUT STREET, APPLETON WI 54911
PHONE (920) 832-1668 FAX (920) 832-1534



10/19/2023

Trenten Woelfel
Finance Director Offer Letter

Dear Trent,

Congratulations on your selection for the Finance Director position at Outagamie County. We are pleased to have you joining our team at the County and hope you are equally excited about this opportunity. Please review ALL of the following:

This job is contingent upon successful completion of the following marked items:

BACKGROUND CHECK

BOARD OF SUPERVIORS APPROVAL OF COUNTY EXECUTIVE APPOINTMENT

- **WAGE:** We are pleased to offer you an annual salary of \$122,075 (2023 base pay). Within our 2023 Exempt Compensation Wage Schedule you will be Grade 20, Step 5. On December 17 you will be placed at Grade 190 Step 3 with an annual salary of \$124,663. Direct Deposit of employee payroll is required for all new employees. The account may be at any financial institution in the United States.
 - Also, as part of our 2023 budget, there will be a \$1000 recruitment/retention payment made to eligible employees active on the payroll as of December 1, 2023.
- **VACATION:** Three weeks upon hire, with additional weeks determined by the normal vacation schedule outlined in the Employee Handbook. You are also able to earn additional compensatory time for hours worked over 45 in workweek.
- **HIRE DATE:** Tentatively, Wednesday, October 25, 2023, pending appointment confirmation by the Board of Supervisors at the October 24, 2023 meeting.
- **BENEFITS:** You are Full-Time Benefit Eligible
 - Benefits that may be available are: Health, Dental, Vision, and Retirement. Employee may be eligible for other benefits.

Pursuant to Wisconsin Law, Employees that will be working 1200 hours annually or more will be considered a participating employee for the Wisconsin Retirement System. This will become effective immediately upon hire. The 2023 Employee required pre-tax contribution rate is 6.8% per paycheck.

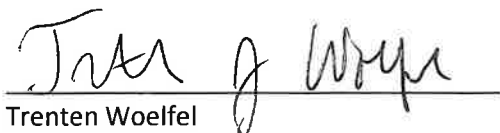
Your employment with Outagamie County is at will. This means your employment is for an indefinite period of time and it is subject to termination by you or Outagamie County with or without cause, with or without notice,

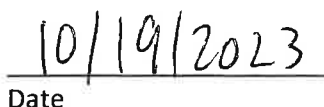
and at any time. Nothing in this policy or any other policy of Outagamie County shall be interpreted to be in conflict with or to eliminate or modify in any way, the at-will employment status of Outagamie County employees.

I have read and accept the above offer. I agree and understand that I have been provided a copy of the Outagamie County Employee Handbook. It is my responsibility to review the handbook and adhere to the policies and procedures of Outagamie County.

Please sign and return a copy of this offer letter to Anne Van by no later than end of day on Thursday October 19th so we can continue the process of appointment accordingly.

I hope that your employment with us will be a long and rewarding one that will be of mutual benefit to both you and Outagamie County.


Trenten Woelfel


Date

Sincerely,

Thomas Nelson
Outagamie County Executive