



**Presents its:**

## **30<sup>th</sup> Annual Conference**

**Monday, September 17, 2018**

**Milwaukee Marriott West**  
W231 N1600 Corporate Court  
Waukesha, WI 53186  
[www.marriott.com/mkemw](http://www.marriott.com/mkemw)

Approved for 4 CTP and 4 FP&A recertification credits by the Association for Financial Professionals at the rate of one credit for each 50 minutes of attendance.

**Register for the Grand Prize Drawing  
and other great prizes!**



# WELCOME

Members and Guests,

It is my pleasure to invite you to the 30th Annual Wisconsin Association for Financial Professionals Conference. This year's conference will be held at the Milwaukee Marriott West located in Waukesha, WI on Monday, September 17th.

Our morning speaker is Penn Vieau, Leadership Expert, Speaker & Coach, of Freedom Personal Development. Penn "walks the talk" when it comes to leadership. Over the course of a multi-decade career in financial services, he worked his way from entry level up through the ranks of management, into an executive leadership position. Here he was tasked with training an ENTIRE BANK, impacting the careers of thousands of people. Oh, and by the way, he was also asked (begged, really) to be THE coach for all 17 of the company's top leaders. You don't want to miss how Penn teaches us to Train Our Brain for Success.

We are honored to have as our keynote speaker, Jon McGlocklin, TV Analyst of the Milwaukee Bucks and President & Co-Founder of the Midwest Athletes Against Childhood Cancer (MACC) Fund. Known as the "Original Buck" From Player, Front-Office, Businessman, Broadcaster, and Philanthropist – "A Five Career Professional!" You don't want to miss Jonny Mac's journey to success.

We will offer three (3) educational breakout sessions in each of the four (4) breakout sessions. The conference will offer up to 4.0 CTP and 4.0 FP&A recertification credits by the Association for Financial Professionals at the rate of one (1) credit for each 50 minutes of attendance.

Please register for the Annual Conference at [www.wiafp.org](http://www.wiafp.org). The Annual Conference begins our calendar year, so this is also a great opportunity to register online for your 2018/2019 WIAFP annual membership. Annual membership includes eight (8) scheduled monthly meetings from October through May with great lunches, informative speakers and superb networking.

A sincere thank you to our event sponsors: Associated Bank, Bank of America, Beacon Business Group, BMO Harris Bank, Dana Investment Advisors, JPMorgan Chase, PNC Bank, and Wintrust Commercial Banking at Town Bank. I would also like to thank the members of the conference planning committee, whose efforts brought this event together.

We are looking forward to the coming year and are excited to share some new ideas with the organization. We want to hear your suggestions for the group, and would love to have your participation as a member and volunteer. Attending the Annual Conference is a great start – we look forward to seeing you there!

Sincerely,



Kristin McLean, WIAFP President and Conference Chairperson

# SPEAKER SESSIONS

**Morning Keynote Speaker: 8:40 – 9:35AM**

**Penn Vieau, Leadership Expert, Speaker & Coach**  
**Freedom Personal Development**



If you are looking for a speaker with vast knowledge of what works in business, combined with a gift for teaching those concepts with boundless energy, you've found your guy.

Penn Vieau "walks the talk" when it comes to leadership. Over the course of a multi-decade career in financial services, he worked his way from entry level up through the ranks of management, into an executive leadership position. Here he was tasked with training an ENTIRE BANK, impacting the careers of thousands of people. Oh, and by the way, he was also asked (begged, really) to be THE coach for all 17 of the company's top leaders.

Penn's got a knack for teaching people how to be absolutely amazing in all aspects of their lives, professional and personal. His special gift is a teaching style that creates not just an engaging and inspiring presentation, but lasting upgrades in the effectiveness of every organization with whom he works.

You'll never forget the time you spend with Penn, and neither will your team.

## **Train Your Brain For Success**

Your Brain is the single biggest driver of your energy, your focus, and the results you get in every area of your life. Your career, your finances, your physical health, your relationships – all of them are constantly created and influenced by your thinking. Unfortunately, your brain didn't come with an owner's manual...until now.

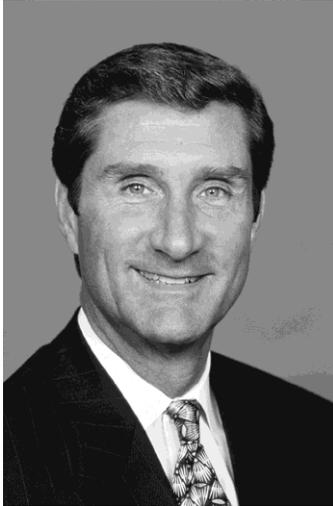
In Train Your Brain For Success you will learn to harness the incredible creative capacity of your mind and achieve your personal best – professionally, financially and personally. Best part? You'll do this in about the time it takes to go out for lunch.

Through that process, we will cover:

- The ways in which your brain literally creates your experience - and your results.
- Your brain's extremely Unhelpful "default settings"
- How to overcome these default settings, and put *you* in charge of your brain and your results.

## Luncheon Keynote Speaker: 12:30 – 1:20PM

### Jon McGlocklin, TV Analyst of the Milwaukee Bucks President & Co-Founder of the MACC Fund



Known as the “Original Buck,” Jon McGlocklin has been associated with the Bucks organization since the inception of the franchise in 1968. The 2017-18 season marks his 42<sup>nd</sup> as an analyst for Bucks TV games, and his 32<sup>nd</sup> paired in the broadcast booth with Jim Paschke. The duo are three-time Wisconsin Emmy Award winners for their work on Bucks telecasts, and had a banner raised to the BMO Harris Bradley Center rafters on March 17, 2016, in honor of their 30 seasons of calling Bucks action together.

McGlocklin averaged 19.6 points per game in the Bucks inaugural season in 1968-69 and went on to play eight years in a Milwaukee uniform. His name appears in five categories on the Bucks all-time career leaders list. Named to the 1969 Eastern Division All-Star team, “Jonny Mac” was a starting guard on the Bucks 1971 World Championship team. For his many on-court contributions to the franchise, his number 14 jersey was retired in 1976 and currently hangs from the rafters inside the BMO Harris Bradley Center.

Following his retirement from basketball in 1976, McGlocklin joined the Bucks front office and, together with former Bucks broadcaster Eddie Doucette, founded the Midwest Athletes Against Childhood Cancer (MACC) Fund. Serving as president, the fund financed construction of the MACC Fund Research Center at the Medical College of Wisconsin and has contributed more than \$62 million to the fight against childhood cancer and related blood disorder research. In June 2004, after spending 18 years as a trustee, he was named trustee emeritus for the Medical College of Wisconsin. McGlocklin is on the State Board of Directors for the Fellowship of Christian Athletes, and is a member of the Indiana Basketball Hall of Fame, the Indiana University Hall of Fame, the Wisconsin Athletic Hall of Fame and the Wisconsin Basketball Coaches Hall of Fame.

Following his playing days in 1976, Jon and his wife, Pam, made Wisconsin home along with their two children, son, Shannon, and daughter, Meghan.

#### **A Five Career Professional**

The “Original Buck” From Player, Front-Office, Businessman, Broadcaster, and Philanthropist.

**Speakers and Program Sessions** – *Speaker Presentations will be available at [www.wiafp.org](http://www.wiafp.org) prior to the conference. If you would like to have printed copies with you at the conference, please print them from [www.wiafp.org](http://www.wiafp.org).*

Session 1: 9:45 – 10:35AM

### **Bridging the Gap – Confronting the Challenges of Decoupled Payments**

**Blaine Carnprobst**, CTP, VP Receivables Product Advisor  
PNC Bank

[blaine.carnprobst@pnc.com](mailto:blaine.carnprobst@pnc.com)

As organizations continue to pursue converting checks to electronic payments in accounts payable, there has been an adverse effect in accounts receivable when it comes to dealing with decoupled remittance processing or missing electronic remittance. This is a growing challenge for organizations, resulting in lower overall auto cash application rates. We will discuss the challenges faced by accounts receivable as the payment landscape changes and present strategies for integrating electronic payments and accounting systems.

**Session Learning Objective 1:** Learn innovative strategies of reconnecting the pieces and streamlining the straight through processing for accounts receivables.

**Session Learning Objective 2:** Insight into overcoming electronic payment challenges and enhancing the integrity of the remittance information.

**Blaine Carnprobst**, is the Receivables Product Advisor in the Treasury Solutions Group (TSG) within PNC Treasury Management. Blaine partners with PNC product management, operations and sales to represent a robust set of receivables services that comprise PNC's A/R Advantage Suite. Blaine joined PNC in April 2017 after more than 30 years of supporting treasury services through operations, product management and business strategy at two other financial institutions.

### **Cyber Security – How To Stay Protected**

**Derek Laczniak**, Director of Cyber Practice  
M3 Insurance

[derek.laczniak@m3ins.com](mailto:derek.laczniak@m3ins.com)

Cyber Security remains one of the hottest topics in risk management. This session will review trends associated with data security breaches, analysis of proper incident response, and critical preventative measures that can be taken to remain protected.

**Derek Laczniak**, is recognized as a leader in the field of Cyber Security Risk Management and has been published both regionally and nationally on varying topics of cyber liability risk management numerous times in the last two years. In addition, Derek maintains a quarterly blog on cyber security for M3 Insurance as well as presenting on topics related to cyber security for private companies and national summits. Critical to Derek's Cyber Security expertise is his

overall knowledge base relative to network security, network infrastructure and security exposure with respect to individual organizations and their operations. Derek has created a proprietary risk assessment strategy that helps quantify overall risk exposure of organizations of all sizes and scopes. In the course of this work, Derek has helped managed Cyber Risk through preventative controls and formal risk transfer mechanisms for individual companies in the middle market to publicly traded space.

Derek has been in the insurance business, as he says “his entire life” having been a product of a family that owned an agency and working in the agency business since high school. He is a graduate of University of Wisconsin – La Crosse with degrees in Risk Management and Economics. He is a licensed agent for Property and Casualty Insurance and a Certified Insurance Counselor (CIC) and Certified Risk Manager (CRM). He sits on the steering committee for the Wisconsin Innovation Awards and is a National Panel Member for Travelers Insurance Technology practice. He is pursuing his Chartered Property Casualty Underwriter (CPCU) designation with hopes of continuing on to complete his Law Degree.

### **Acquisition Complete, Now The Fun Starts: Considerations for Global Integration**

**Becky Ruwe**, Vice President Corporate Treasury Consultant     [rebecca.ruwe@jpmorgan.com](mailto:rebecca.ruwe@jpmorgan.com)  
JPMorgan Chase

**Rhonda Kruman**, ED Corporate Treasury Consultant     [rhonda.a.kruman@jpmorgan.com](mailto:rhonda.a.kruman@jpmorgan.com)  
JPMorgan Chase

We will explore lessons learned by a treasury management team during their global treasury integration project that was a result of multiple acquisitions. Our discussion will highlight best practices for managing a successful acquisition from a treasury perspective as well as how to approach integration after the acquisition closes.

Key Audience Learnings:

1. How the treasury team should approach an acquisition.
2. The treasury team’s role in an integration of an acquired company.

**Becky Ruwe**, is a Corporate Treasury Consultant identifying the most efficient solutions to our clients. Becky received her MBA from the Kellogg School of Management and Finance degree from the University of Illinois and has over 25 years of financial services experience in a variety of roles.

**Rhonda Kruman**, is a Corporate Treasury Consultant providing treasury management expertise to clients executing mergers, acquisitions and divestitures. With close collaboration pre- and post- event – she helps clients achieve treasury related operating efficiencies and cost synergies. Rhonda has over 35 years of financial services experience across a variety of roles.

## **Lessons from the North: Making ISO20022 Work For You**

**Kate Choi**, Senior Product Manager, ERP Integration  
BMO Financial Group

[Kate.Choi@bmo.com](mailto:Kate.Choi@bmo.com)

ISO 20022 has emerged as the global language standard for financial communications. This session will uncover the challenges overcome by international businesses in converting their primary payment methods to ISO 20022, and outline how ISO can improve overall operations for companies. From international payment trends to commentary on how the U.S. can overcome challenges associated with late adoption, attendees will gain a thorough understanding of ISO 20022, including why they should care about it, what the benefits are and varying approaches to implementing an international payment strategy.

**Kate Choi**, is a Senior Product Manager at BMO Harris Bank, specializing in ERP system integrations. Current projects include leading BMO's ISO 20022 Pilot Program and preparing for emerging technologies like Account Validation and Faster Payments. Kate has in-depth experience in file-based solutions and helps clients design optimal structures with their bank, leveraging today's technology, to position themselves for tomorrow's payment flows.

## **International Treasury and FX Update**

**Kristin McLean**, Senior Vice President, Sr. Treasury Sales Officer  
Bank of America Merrill Lynch

[kristin.mclean@baml.com](mailto:kristin.mclean@baml.com)

**Heather Boyer-Sweis**, Director, Rates & Currencies Origination  
Bank of America Merrill Lynch

[heather.boyer@baml.com](mailto:heather.boyer@baml.com)

Today's rapidly changing technologies and global trends offer modern treasury teams the opportunity to look forward rather than backward, improving forecasting and being better prepared for change. This session will review working capital, innovative, and globally transformative trends, and offer treasury practitioners logical steps to better managing their international treasury operations and establishing a best practice approach to risk management.

**Kristin McLean** is a Senior Vice President, Sr. Treasury Solutions Officer with Bank of America Merrill Lynch Global Commercial Banking. She is responsible for delivering Bank of America's global treasury solutions to her clients, who are predominantly headquartered in the state of Wisconsin. In her role, Kristin works as a trusted advisor with clients within multiple industries to design global treasury solutions that meet their working capital and liquidity objectives.

A native of Wisconsin, Kristin graduated from Northwestern University with a Bachelor of Science in Communication Studies. Kristin is currently serving as President of the WIAFP. She also serves on the Board of Directors for her son's preschool, All God's Children, in Delafield, WI. She currently lives outside of Milwaukee with her husband, daughter, and son.

**Heather Boyer-Sweis**, is a senior product specialist, focusing on Foreign Exchange and Interest Rate Risk Management.

Heather joined Bank of America in 2001 as an analyst with Global Foreign Exchange Group. She was promoted to associate in 2004, followed by vice president and finally making director in 2010. Throughout her time with the bank she has covered a variety of clients segments including Oil & Gas, For-Profit Healthcare, Private Wealth and Middle Market. Heather's current responsibilities include general industries for Michigan, Wisconsin and Minnesota.

Heather Boyer-Sweis, graduated from the University of Illinois Champaign-Urbana where she received a B.A. in Finance.

*Currently, Heather is a member of the Chicago Finance Exchange as well as the West Loop Community Organization.*

### **Cybersecurity Update: Current Threats, Mitigation Strategies and Compliance Updates**

**William Schmidt**, CISSP, CISA, ISA, Business Information Security Officer  
TSYS Merchant Solutions

[wschmidt@tsys.com](mailto:wschmidt@tsys.com)

Attendees will find this session important because the face of cybersecurity fraud is ever-changing and it is imperative that banks and their commercial clients be swift to respond. This session provides an overview of current threats and will review statistics on the most common avenues of attacks, as well as the most effective known mitigations to address these treats. A brief update to PCI-DSS requirements will be included along with time for Q&A.

**William Schmidt**, is an information technology and cybersecurity professional with 18+ years' experience in the industry, working primarily with financial institutions. He started his career as a network engineer at a Wall Street investment bank, moving in 2005 to information security as a penetration tester. He became a PCI QSA in 2007 and has been a PCI ISA since 2014. William is experienced with many IT control frameworks including the NIST Risk Management Framework (RMF) and Cybersecurity Framework (CSF). He also served as an external SOC (Service Organization Controls) auditor for many bank service companies and financial service providers, and also did both SOX and FFIEC assessments. He currently serves as the Business Information Officer for the Merchant segment of TSYS where he helps interpret and implement TSYS' security policies and strategies in the real world.

## **Blockchain: Beyond Bitcoin**

Jonathan Holdowsky, Senior Manager  
Deloitte

[jholdowsky@deloitte.com](mailto:jholdowsky@deloitte.com)

Digital transformation is reshaping the ways that organizations operate and people interact. To successfully traverse the sometimes perilous journey of digital transformation, organizations should understand the foundational technologies and processes that make this transformation possible. Key among these is blockchain technology. Certainly, blockchain technology is popularly known as the underlying enabler of cryptocurrency, like bitcoin. However, blockchain—and its immutable, secure, and distributed ledger characteristics - is emerging as a business focus for organizations across numerous industries and functions well beyond cryptocurrency—from manufacturing to healthcare to the public sector. Because blockchain may offer transformational potential in ways to store data and record transactions, it has caught the imagination of organizations big and small. In our discussion, we plan to provide a high-level overview of blockchain including a discussion of what blockchain technology is, its operating and market characteristics, key drivers and challenges, common use cases, among other areas. We will also leave ample time for free-flowing discussion.

**Jonathan Holdowsky**, is a senior manager with Deloitte Services LP and part of Deloitte's Center for Integrated Research. In this role, he has managed a wide array of thought leadership initiatives on issues of strategic importance to clients within consumer and manufacturing sectors. Jonathan's published research explores the promise of such emerging technologies as additive and advanced manufacturing, blockchain, the Internet of Things, Industry 4.0, among other areas. Jonathan is especially passionate about the larger public policy issues that emerge from the adoption of such technologies, generally.

Prior to joining Deloitte in early 2007, Jonathan served as a senior associate for S&P Research Services. He has also held engineering and business development roles for Northrop Grumman and the Singer Company. Jonathan is formally educated in the fields of engineering, economics, international business, finance, and law.

## **Beyond the Buzz – Start Your Emerging Technology Preparedness**

R. Mark Sorg, SVP Treasury Insight Consultant  
Wells Fargo Bank

[mark.sorg@comcast.net](mailto:mark.sorg@comcast.net)

The hype is all around us – accept a payment from your customer's car, no swipe needed. Use Big Data to gain insights from your cash flows and your customer's buying habits. Transfer assets and reconcile in real-time. Rapidly advancing technology is altering the way we do business, enabling us to increase convenience and relevance. What do we need to do to prepare for the new wave of tech? From the Internet of Things to blockchain and more, we'll discuss how

new technologies affect how companies do business and what treasury and finance departments should do to prepare.

**Mark Sorg**, is a member of the Wells Fargo TM Insights Group. As a connector of thought leadership, technology and innovation, his team is helping clients advance into the next generation of payments by providing guidance on emerging technologies like Blockchain, the internet of things, artificial intelligence, real-time payments, cryptocurrencies, robotic process automation, and big data.

Mark has 14 years of treasury management, financial technology & strategy consulting experience. Mark's background also includes: working capital optimization, e-commerce product management, ERP integration, revenue cycle enhancement, and business process management. Prior to joining Wells Fargo, Mark held various sales management and leadership roles within the pharmaceutical and electronics industries.

Mark received a Bachelor of Science in Business Administration from Butler University in Indianapolis, Indiana and is a Certified Treasury Professional and an IOFM accredited Procure-to-Pay Solutions Consultant.

### **Got Data? Required Data Processing Agreements under the GDPR**

**Martin J. McLaughlin**, Shareholder  
Reinhart Boerner Van Deuren S.C.

[mmclaughlin@reinhardt.com](mailto:mmclaughlin@reinhardt.com)

**Sarah Sargent**, Attorney  
Reinhart Boerner Van Deuren S.C.

[ssargent@reinhardt.com](mailto:ssargent@reinhardt.com)

The EU's General Data Protection Regulation ("GDPR") generally requires that a Controller enter into a written contract, commonly known as a data processing agreement or DPA, with any third party with whom it shares EU personal data. For instance, if your firm uses cloud service providers, third party payroll processors, SaaS providers, benefits administrators or other similar third parties to store, use or otherwise process EU Personal data, a DPA is likely required. Our presentation will focus on when a DPA is required under the GDPR, what contractual provisions are required, best practices for contracting as a controller, and best practices for contracting as a processor.

**Martin J. McLaughlin**, is a shareholder in Reinhart's Corporate Law Practice and Securities group centering his practice on corporate finance, private equity, mergers and acquisitions, general corporate counsel. In addition, Marty serves as Chair of the firm's Data Privacy and Cybersecurity Practice. In that capacity, he regularly counsels C-suites on information security compliance and risk management, advises clients on cross-border data transfer, including complying with the GDPR, prepares information security policies and incident response plans and supervises client responses to malware attacks and other data privacy related incidents. Marty earned the Certified Information Privacy Professional/United States (CIPP/US) designation from the International Association of Privacy Professionals.

**Sarah Sargent**, is an attorney in Reinhart's Litigation Practice and a member of the firm's Data Privacy and Cybersecurity group. Her work focuses on employee benefits litigation including both traditional and arbitrations arising under ERISA. Additionally, she specializes on counseling clients on security compliance, risk management, cross-border data transfers—including GDPR compliance—privacy policies and incident response plans. She also supervises client responses to malware attacks and other data privacy related incidents. Sarah is also a Certified Information Privacy Professional/United States (CIPP/US).

Session 4: 2:40 – 3:30PM

### **Jumping in the Deep End – It's Time to Develop a Strategy for Emerging Payment Channels**

**Andy Ai**, APPSC, VP Treasury Solutions Group  
PNC Bank

[anthony.ai@pnc.com](mailto:anthony.ai@pnc.com)

Unlike other industries that have been revolutionized by modern technology, the U.S. payments space has remained largely unchanged — until now, that is. Same Day ACH now supports both debit and credit transactions, peer-to-peer network technology is entering the business world, real-time payments have been formally introduced to the U.S. payment system and expanding API connectivity is driving a migration from batch processing to real-time execution. These disruptive developments have the potential to transform traditional payment models. This session will focus on the evolution and ongoing development of emerging payment channels. We will introduce a framework for evaluating the application of these alternatives and highlight potential use cases.

**Session Learning Objective 1:** Learn about the recent innovation in the payment landscape. We will discuss the incremental business value created and explore potential use cases.

**Session Learning Objective 2:** Strategies for leveraging these new technologies to meaningfully address a variety of top of mind payment considerations – processing and administrative costs, payment fraud, escheatment and transaction friction.

**Anthony "Andy" Ai**, has been with PNC Financial Services Group for over 15 years. In his current role, Ai consults corporate clients on developing innovative solutions to meet their complex needs. He is also a frequent speaker at industry and client events on all topics related to working capital improvement and Treasury Management solutions. Ai interfaces with sales and product development groups to leverage business intelligence and develop products that meet client and industry needs.

## **Applying Six Sigma Methodology to Cash Forecasting Process**

**Patti Effertz**, Assistant Treasurer  
Komatsu Mining Corporation

[patti.effertz@mining.komatsu](mailto:patti.effertz@mining.komatsu)

Attendees will find this session important because it is based on real experiences in improving the process of cash forecasting to gain better visibility, accuracy and ownership of the forecast. I will share our company's experience and the benefits we gained from our approach so that the attendee has an example from which to select potential solutions for their own organization. This session will highlight how we used Six Sigma methodology and concepts at a high-level and the benefits of using a structured approach to process improvement. It will also address how improving this process benefited our ability to make better cash management, liquidity, debt & investment decisions. Better cash forecasting has direct implications to interest expense, liquidity utilization and trade working capital.

**Patti Effertz**, is currently the Assistant Treasurer for Komatsu Mining Corp in Milwaukee, WI. Prior to joining Komatsu (f/k/a Joy Global until acquisition in April 2017), she held treasury leadership roles at GE Healthcare, Rexnord, Rockwell Automation and Morris Material Handling. In addition to treasury management, prior responsibilities have included credit management and accounting. Additionally, one of her most interesting roles was a Six Sigma Blackbelt Champion leading process improvement and change management for both Financial Shared Services and Customer Service centers.

On a personal note, Patti lives in Pewaukee, WI with her husband and two young boys. Recently she became an official suburban soccer mom in addition to an already active hockey and baseball mom. Loves the outdoors even the Wisconsin winters. She is an active and passionate supporter of several children's and cancer related charities.

## **Payment Networks: What are They and Should You Consider One?**

**Adam Keen**, Senior Vice President  
Associated Bank N.A.

[adam.keen@associatedbank.com](mailto:adam.keen@associatedbank.com)

Join Adam as he explores the risks and costs surrounding paper check transactions. He will discuss solutions offered through payment networks and things to consider when choosing what solution is right for your business.

**Adam Keen**, is a Senior Vice President with responsibilities for Treasury Management Sales and Emerging Payments within the CDTM team at Associated Bank. He leads a team of seasoned treasury management professionals responsible for partnering with commercial and corporate clients to deliver efficient, value-add treasury management solutions. He also manages a team responsible for identifying shifts and opportunities in the B2B payments landscape.

# GENERAL INFORMATION

## **Presentation Copies:**

Copies of the speaker presentations may be available on-line at [www.wiafp.org](http://www.wiafp.org) on September 15, 2017. Please print any copies that you would like to bring with you to the conference.

## **Cancellations:**

Notification of cancellation must be called into Alicia Buttchen at (262) 792-7126 by September 10, 2018. Cancellations received after Monday, September 10, 2018 will be subject to a \$50 cancellation fee. No refunds will be given for cancellations after September 14, 2018.

## **Dress/Attire:**

Conference participants are encouraged to wear business casual attire for the conference.

## **Hotel Accommodations:**

To reserve a room, please contact the Milwaukee Marriott West at 877-651-7666. Participants are responsible for making their own hotel reservations.

## **CTP/CCM and FP&A Recertification Credits:**

The 30<sup>th</sup> Annual Conference offers participants the opportunity to acquire CTP/CCM and FP&A credits to enhance your professional standing. This year's conference is pending approval for up to 4.0 CTP and 4.0 FP&A recertification credits by the Association for Financial Professionals at the rate of one credit for each 50 minutes of attendance. By attending the Annual Conference, you can obtain educational credits along with the latest information on treasury management techniques and technology.

## **Questions:**

If you have any questions regarding the conference, please contact Kristin McLean at (262) 207-3323 or email [kristin.mclean@baml.com](mailto:kristin.mclean@baml.com)

# ONLINE REGISTRATION

Register at [www.wiafp.org](http://www.wiafp.org)

## WIAFP Annual Membership and Conference Fees:

The WIAFP membership fee for program year 2018-2019 is \$300. Annual membership entitles you to discounted conference registration fees as indicated below. Membership includes the monthly meetings at no additional cost. Non-members luncheons are \$50/meeting.

## Conference Registration Fees:

	If received by 9/3/18	If received after 9/3/18
WIAFP Members	\$200	\$250
Non-Members	\$300	\$350
Breakfast or Lunch General Session only	\$50	\$50

When you register online you will have the following choices:

- Pay the Annual WIAFP Membership Fee of \$300 plus the Conference Registration Fee to attend the Conference at the Member rate of \$200, for a total of \$500.
- Pay to attend the WIAFP Conference at the Non-member rate of \$300.
- Join the conference as a breakfast or luncheon participant only \$50

**WIAFP will accept payment by check or credit card. If you choose check you can register on-line and bring your check to the conference or mail your payment to:**

WIAFP  
Aurora Health Care  
Attn: Jeryl Anthony  
PO Box 341880  
Milwaukee, WI 53234-1880

## Questions:

If you have any problems with online registration, please contact Alicia Buttchen at (262) 792-7126 or email [abuttchen@firstbusiness.com](mailto:abuttchen@firstbusiness.com)

**DISCOUNTED Registration Deadline is Monday, September 3, 2018**  
**FINAL Registration Deadline is Thursday, September 13, 2018**

**We would like to express a very Special Thank You To Our Sponsors:**

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