



Association for
Financial Professionals
of Western New York

Presents its

Fall Half-Day Conference Sponsored By:



M&T Bank

Wednesday, May 12th, 2010

Located at Casa Larga Vineyards



**2287 TURK HILL ROAD
FAIRPORT, NY 14450**

THE ASSOCIATION FOR FINANCIAL PROFESSIONALS OF WESTERN NY

The Association for Financial Professionals of Western New York, is a non-profit, educationally oriented organization, which provides a forum for the active and open exchange of concepts and techniques related to the practice of cash and treasury management. Today's membership represents a wide cross section of local industry professionals. Membership is open to individuals from businesses and non-profit organizations, financial service vendors and banks. A free flow of ideas and information is encouraged and maintained among the Association's members.

Each year, the AFPWNY bases its education program decisions on participant response to the previous year's programs. This process ensures that topics addressed during each seminar reflect the most prevalent issues, and that the information provided is on leading edge technologies. Conference attendance continues to flourish resulting from feedback received from attendees.

AFPWNY encourages member participation in the National Association for Financial Professionals (AFP). In addition to offering a wide range of continuing education opportunities, professional certification and industry standards programs, the AFP has become an invaluable resource for disciplines represented in organizational and corporate treasury areas. Together with affiliate organizations, AFP works to increase professional skills and to enhance the recognition and credibility of the treasury management profession.

Program Registration & Lunch - 12:00 pm – 1:00 pm

Lunch will be provided during registration. Come early, it's a great chance to network!

Session I – 1:00 pm – 2:10 pm

[TOPIC – Protecting Payment Card Data -- A Growing Concern](#)

Presenter - Doug Dunbar, Senior Product Manager for Merchant Services and Commercial Cards

Data security compromise events, and the impacts they entail, represent a growing concern to any organization that stores, processes or transmits cardholder data. This presentation will focus on current trends in data compromise events, using actual compromise examples. The Payment Card Industry Data Security Standard (PCI DSS) will be introduced, along with a discussion of validation versus compliance.

Session Break – 2:10 pm – 2:30 pm

Session II – 2:30pm – 3:40 pm

[TOPIC – Procurement Card Best Practices of Program Expansion & Growth with Control](#)

Presenter - Juliane Krause, Vice President & Regional Sales Manager, Commercial Cards Sales Manager

Now that you have a Purchasing Card Program, expand your efficiencies and purchase volume while keeping auditors happy. First, find out which of your suppliers can be paid by your purchasing card, then determine how to communicate and reconcile the payment. In this presentation, we'll help show you how to do this and grow your program by discussing some P-Card Best Practices.

Session Break – 3:40 pm – 3:55 pm

Session III – 3:55 pm – 5:00 pm

[TOPIC – U.S. and WNY Economic Outlook -- What Comes Next?](#)

Presenter - Gary D. Keith, Vice President and Regional Economist

The U.S. economy is emerging from the sharpest downturn since the 1930s. Yet many indicators continue to show mixed results, making it difficult to chart a clear course for business plans. Gary Keith, regional economist at M&T Bank, will review the current state of the U.S. and WNY economies and discuss the near-term outlook for both regions.

Reception – 5:00 pm – 7:00 pm

Door prizes will be awarded during the breaks and at the reception!!!

Speaker Bios

Doug Dunbar – Senior Product Manager for Merchant Services and Commercial Cards

Doug Dunbar joined M&T in 1997, and has an extensive background in Treasury Management and Merchant Services, earning his CCM in 1998. Doug has been in his current role as Senior Product Manager for Merchant Services and Commercial Cards since 2005. In his role, Doug and his team are responsible for both the Merchant Services and Commercial Card product sets offered by M&T Bank.

Doug is a graduate of the University of Buffalo, where he earned both a Bachelor's degree in Political Science and an MBA.

Julie Krause, CTP – Vice President and Regional Sales Manager, Commercial Cards Sales Manager

Julie Krause has been with M&T since 1998 and is the Regional Sales Manager for Treasury Management Sales for Pennsylvania and is the Sales Manager for Commercial Card Consultants throughout the bank. She specializes in developing creative and cost effective treasury management and card solutions for middle market, business banking, healthcare, and government organizations.

Julie earned a Bachelor of Science degree in psychology from the University of Texas and obtained her MBA from the William E. Simon School of Business Administration at the University of Rochester. Additionally, she has received her CTP (Certified Treasury Professional) designee from the Association of Financial Professionals and continues to be involved in that organization. Julie is also actively involved in the United Way of the Capital Region on both the Emerging Leaders Society and Women's Leadership Network.

Gary D. Keith, Vice President and Regional Economist

Throughout a 26-year career at M&T Bank, Gary D. Keith has provided economic research and analysis support to M&T's executive management and commercial banking business units. In addition to giving frequent updates to M&T customers, business and trade groups and the Federal Reserve Bank of New York, he writes a monthly column on regional economic trends for the Rochester Business Journal.

Keith has extensive experience tracking the Western New York economy and forecasting regional performance trends. Over the past two decades, as M&T expanded its geographic footprint beyond Upstate New York, his insights have been sharpened by observations on the economic "success factors" that can be applied to our own region.

He holds frequent discussions with M&T commercial customers, who are, in Keith's words, "his eyes and ears," helping to tie together the economic variables that describe the macroeconomy with real world decisions that businesses make every day.

Western New York performed much better than many areas of the country during the Great Recession. With the national economy beginning to expand again, it is better positioned to compete for new growth than in past recoveries.

The area's continuing transformation from an industrial to a service-based economy provides new opportunities for our region. The task going forward will be to capitalize on our economic assets and re-define the breadth and depth of the Western New York economy, both to outsiders and to local residents.

THE ASSOCIATION FOR FINANCIAL PROFESSIONALS OF WESTERN NY BOARD OF DIRECTORS AND ITS MEMBERS WOULD LIKE TO EXTEND OUR GRATITUDE TO:



M&T Bank

FOR PROVIDING THE NECESSARY FUNDING TO MAKE THIS HALF-DAY CONFERENCE POSSIBLE. FOR MORE INFORMATION PLEASE VISIT OUR WEBSITE AT WWW.AFPWNY.ORG.

Approval Pending for 4 CTP / CCM renewal credits by the Association for Financial Professionals

REGISTRATION

Fees are payable in full prior to the conference. Registration fees are non-refundable; substitutions **will** be honored. Any cancellations must be received by May 11th or full registration fee will be assessed.

AFP Members	\$100.00
Non-Members	\$130.00

All registrations and payment options must be completed on-line at www.afpwny.org:

CONFERENCE CHAIRPERSON

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