



ASSOCIATION FOR  
FINANCIAL  
PROFESSIONALS  

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Western NY

The AFP of Western New York presents its  
2018 Spring Half-Day Conference Sponsored By:



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**Wednesday, May 23<sup>rd</sup>, 2018**  
**Located at Locust Hill Country Club**



**LOCUST HILL**  
• COUNTRY CLUB •

**2000 Jefferson Rd, Pittsford, NY, 14534, (585) 427-7010**

#### 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.

## **Conference Schedule and Speaker Information:**

*This Conference has been approved for up to **3.6 CTP/CCM** and **2.4 FP&A** recertification credits by the Association for Financial Professionals*

### **Program Registration & Lunch: 12:00 PM – 1:00 PM**

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

### **Annual Meeting: 12:45 PM – 1:00 PM**

**Agenda: Approve Last Year's Meeting Minutes, Approve FY19 Proposed Budget, Approve FY19 Bylaws, Approved FY19 Proposed Board of Directors, Review FY19 Schedule of Events, and Conduct FY18 Member Referral Raffle**

### **Session 1: 1:00 PM – 2:00 PM**

**Topic:** Welcome to the Land of Fintech  
**Speaker:** Rick Fiorito, Chief Revenue Officer – Transactis

Fintech is an industry driven by innovation. Same Day ACH and the rise of alternative payments like Venmo and Apple Pay have opened new doors and opportunities. This session will focus on the impact of innovations and evolving technologies, rising trends, and the future of the payments industry.



**Rick Fiorito**  
**Chief Revenue Officer – Transactis**

Rick Fiorito brings more than 30 years of experience and senior leadership in information technology, receivables management and payments. In senior leadership positions at AT&T, Verizon/MCI, SkyTel, NCO, BNY Mellon and ACI/ORCC, Rick developed the reputation as an innovative leader who develops repeatable business practices to accelerate profitable revenue growth. As president of Accelerated Payment Systems/NCO, an early EBPP market entrant, he introduced many of the e-payment industry best practices that are common today.

### **Session Break: 2:00 PM – 2:15 PM**

## Session 2: 2:15 PM - 3:15 PM

**Topic:** Are YOU Maximizing Your Investment in Your TMS Workstation?  
**Speaker:** Shrikant Yarlagadda, Vice President – C-Vision, Inc.

The realized benefits of today's TMS Workstations go far beyond the traditional or siloed approach of addressing specific functions. Process automation within your TMS can result in data access in real time, and enabling/ empowering day-to-day business decisions at scale.

*Objectives:*

- Review current state of TMS Workstations
- Understanding how to get secure, scalable and integrated access to your processes
- Discussing the impact on Cash Positioning, Payments, and Accounting



**Shrikant Yarlagadda**  
**Vice President – C-Vision, Inc.**

Shrikant Yarlagadda is a Vice President with C-Vision Inc., a Michigan based Services Provider delivering turnkey solutions to its customers. His 30 years in the industry covers both advisory and technical consulting stints across various verticals. Shrikant's expertise lies in business process re-engineering and optimization and in this context, he has covered various process areas including finance, supply chain, etc. During this period, he has successfully executed and deployed various solutions covering performance management applications, accounting systems, data warehouses, analytics, and innovative solutions covering augmented reality, Internet of Things (IoT), etc.

## Session Break: 3:15 PM – 3:30 PM

## Session 3: 3:30 PM - 4:30 PM

**Topic:** Partnering Within Your TMS  
**Speaker:** Quinton Joyner, Senior Manager – C-Vision, Inc.

Consolidating your organization's multiple Treasury systems into a single platform is now a reality. While Enterprise Resource Planning (ERP) solutions offer many treasury functions and banking links, they remain "jack-of-all-trade" tools designed to provide a "single system" approach to back-office functions. It comes at the significant cost of ongoing IT investment. How are you addressing this?

*Objectives:*

- Review ERP best practices for your organization
- Review TMS best practices for your organization
- Discuss if and how the two can play together



**Quinton Joyner**  
**Senior Manager – C-Vision, Inc.**

Quinton Joyner, a graduate of Rowan University began his professional career at Commerce Bank in Mt Laurel, NJ. Starting with Back-Office Operations, Quinton completed a 5-year stint in Cash Management as an Implementation Specialist. He next spent 10 years at Kyriba Corp, a leading Cloud based SaaS TMS provider as an Implementation Consultant. Quinton performed a variety of roles, including being a Software Support Contact for North America, Datacenter Builder, Hub Management Team Member, Formats Specialist, and Senior Connectivity Team Member. A Swift certified specialist, Quinton now serves as a Senior Manager at C-Vision, Inc., a significant player in the Fintech market, helping deliver and implement innovative business solutions across various verticals.

**Reception: 4:30 PM – 6:00 PM**  
**Raffle prizes will be awarded during the reception!!!**

## **Lunch Menu Information:**

Mixed Garden Greens Salad w/ Balsamic Vinaigrette or Ranch Dressing  
Pasta Salad  
Fresh Cut Fruit Salad  
Seasonal Steamed Vegetables  
Warm Rolls with Butter

### Entrees:

Roasted Chicken with Sundried Tomato and Pesto  
Beef Tenderloin Tips with Demi-Glace and Blue Cheese

### Beverages:

Coffee/Tea  
Water

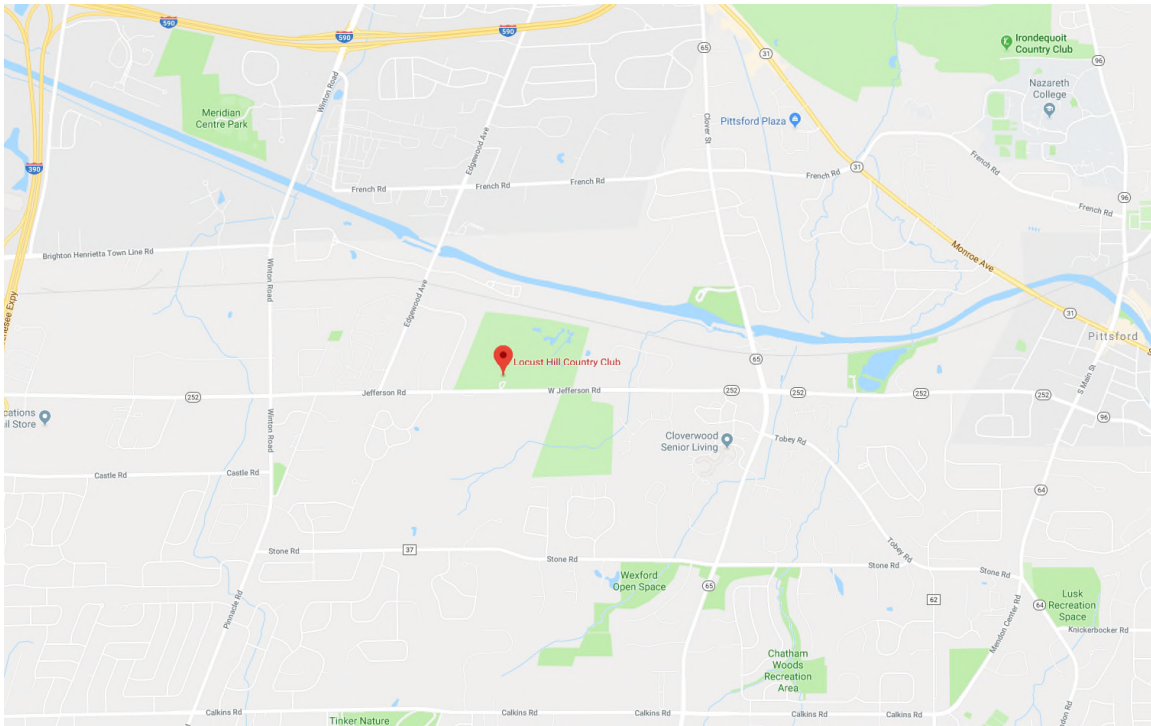
## **Reception Menu Information:**

Baked Brie Wheel w/Toasted Baguettes  
Spinach and Artichoke Dip  
Chicken Satay w/Peanut Dipping Sauce  
Vegetable Egg Rolls  
Swedish Meatballs

### Beverages:

Assorted Beer/Wine/Spirits

## Directions to Locust Hill Country Club:



**From the North:** Take I-590 S to Exit 2A for NY-31 W/Monroe Ave. Turn right after Valvoline Instant Oil Change (on the right). Turn left onto Edgewood Ave. Turn left onto NY-252 E. Locust Hill Country Club will be on your left.

**From the South:** Take I-390 N to Exit 14 for NY-15A/E Henrietta Rd. toward NY-252/Jefferson Rd. Turn right onto NY-15A S/E Henrietta Rd. Turn left onto Castle Rd. Turn left onto S Winton Rd. Turn right onto NY-252 E. Locust Hill Country Club will be on your left.

**From the West:** Take I-90 E to Exit 14 for NY-15A/E Henrietta Rd. toward NY-252/Jefferson Rd. Turn right onto NY-15A S/E Henrietta Rd. Turn left onto Castle Rd. Turn left onto S Winton Rd. Turn right onto NY-252 E. Locust Hill Country Club will be on your left.

**From the East:** Take I-90 W to Exit 45 for I-490 W toward Rochester. Take Exit 27 for NY-96 toward Bushnell's Basin. Turn right onto NY-96 N. Continue onto NY-252 W/W Jefferson Rd. Locust Hill Country Club will be on your right.