



The AFP of Western New York presents its  
Spring Half-Day Conference & Annual Meeting

**In Partnership With**



**Wednesday, May 29<sup>th</sup>, 2024**  
**Located at 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 **TBD** CTP/CCM and **TBD** FPAC recertification credits by the Association for Financial Professionals at the rate of one credit for each 50 minutes of attendance.*

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

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

**Agenda:** Approve Last Year's Meeting Minutes, Approve FY25 Proposed Budget, Approve FY25 Bylaws, Approve FY25 Proposed Board of Directors, Review FY25 Schedule of Events

### Session # 1: 1:00 PM – 2:00 PM

**Topic:** What Does Today's Treasurer Need to Know about AI?

**Speaker:** Zach Stimler, Director of Partner Success – Trovata

**Session Description:** The introduction of ChatGPT has quickly transformed the world of work. Executives immediately started identifying how to leverage it to automate processes, and adoption has continued to accelerate. For finance professionals, it begs the question: what does it all mean for the way you work? The reality is generative AI is here, and it's adapting and learning. Finance and treasury professionals who adapt and learn with it can lead the future. In this session, unlock key steps you can take to help your team develop generative AI fluency and enhance relevant skills. These are the first steps to unlocking a future where AI accelerates financial analysis and reporting, enhances risk mitigation efforts, and optimizes financial operations.

## Speaker Information



**Zach Stimler**  
**Director of Partner Success**  
**Trovata**

Zach Stimler heads up the Partner Success team at Trovata that is 100% focused on maximizing the value that Trovata delivers to partner organizations like Wells Fargo. Prior to joining Trovata, Zach spent 4 years building 'product led growth' programs at Quora and, more recently, helped develop the foundational GTM strategy for Ribbon Health, an enterprise healthcare data platform.

Born and raised in Westchester County, NY, Zach received his BS at The Wharton School at the University of Pennsylvania and now resides in NYC. Outside of work, you'll find him cooking for friends and family.

## Session # 2: 2:15 PM – 3:15 PM

**Topic:** Economic Update

**Speaker:** Tim Quinlan, Managing Director and Senior Economist – Wells Fargo

**Session Description:** Despite widespread expectation that rates would be coming down this year, policymakers at the Federal Reserve have not yet begun guiding rates lower. In this segment, Wells Fargo Economist Tim Quinlan will discuss the self-defeating prophesy of lower rates and how a resilient economy is slowing progress in bringing down inflation.

### Speaker Information



**Tim Quinlan**  
**Managing Director and Senior Economist**  
**Wells Fargo**

Tim Quinlan is a managing director and senior economist with Wells Fargo Securities. Based in Charlotte, North Carolina, he provides analysis on U.S. economy and major foreign economies. Tim's work has been published in academic economic journals and his comments on the economy regularly appear in The Wall Street Journal, The New York Times and USA Today. He is also a frequent guest on Bloomberg TV, CNBC and National Public Radio.

Tim first joined the company in 2002 and previously held positions as a trust account portfolio manager and investment strategist before joining the economics group in 2007. Prior to joining the company, he worked for Putnam Investments in Boston. Tim is a member of the National Association for Business Economics. Tim has a B.A. from Siena College in Albany, New York.

## Session # 3: 3:30 PM – 4:30 PM

**Topic:** Feed the Need for Speed – We All Have Real-Time Payments – Now What?

**Speaker:** Art Brieske, Head of Instant Payments, Global Treasury Management – Wells Fargo

**Session Description:** The Payments landscape is rapidly evolving with growing demand for real-time payments on the global scale with consumer expectations driving corporate demand. In this session Wells Fargo's Head of Instant Payments, Art Brieske, will discuss the Instant/Real-Time Payments landscape and what companies can expect in the future as these payment infrastructures increase adoption.

### Speaker Information



**Art Brieske**

**Head of Instant Payments, Global Treasury Management  
Wells Fargo**

Prior to joining Wells Fargo, Art served as Managing Director and Global Head of Payments at Goldman Sachs, a role he assumed in 2019 to build a single global payments platform for the new Transaction Bank. Before Goldman Sachs, he served as Managing Director and the Head of Global Real-time Payments within J.P. Morgan Payments where he launched RTP in the U.S. and SEPA (Single Euro Payments Area) Instant. Art also served at Deutsche Bank as Managing Director for nearly two decades managing Payment Products in various senior leadership positions in the Global Transaction Bank.

Art has an M.B.A. in Finance from Case Western Reserve University, Weatherhead School of Management and a Bachelor of Science degree in Banking and Finance from University of Wisconsin – LaCrosse.

**Cocktail Reception: 4:30 PM – 6:30 PM**



## Menu Information (In-Person Attendees)

### Lunch:

- Soup Du Jour with Crackers
- Mixed Garden Salad with Balsamic & Ranch Dressings
- Sliced Ham, Roast Beef, & Roast Turkey
- Sliced Assorted Cheeses
- Assortment of Bread, Deli Rolls, & Condiments
- Potato Chips
- Seasonal Vegetables
- Oven Roasted Potatoes
- Chicken Marsala
- Sliced Top Sirloin

### Breaks:

- Cookies & Brownies
- Water
- Coffee & Tea Station

### Happy Hour:

- Assorted Beer, Wine, Liquor, Soft Drinks & Juices
- Hors D'oeuvres:
  - Lamb Lollipops
  - Brie & Raspberry Puffs
  - Bacon Wrapped Scallops
  - Spanakopita