



The AFP of Western New York presents its
2022 Winter Half-Day Conference

Sponsored By



Wednesday, February 2nd, 2022
DoubleTree by Hilton Hotel Rochester
1111 Jefferson Road, Rochester, NY 14623

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 at the rate of one credit for each 50 minutes of attendance.

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 One: 1:00 PM – 2:00 PM

Topic: Embedded Finance, the Final Frontier of Value Creation

Speaker: Paul Staples – Global Head of Banking as a Service Proposition – HSBC

Session Description: With all the buzz that embedded finance will be a \$7tr industry by 2030, what is it, and why should you care? Embedded finance is about how banks who produce financial services enable brands, merchants, technology companies and platforms to integrate financial services into their offerings to remove friction and create new business models. Imagine a world where you get your banking services from your favorite brand and without ever having to interact with a traditional bank. It makes for a simpler life.

Speaker Information



Paul Staples – Global Head of Banking as a Service Proposition – HSBC

Paul Staples is a banker and entrepreneur. With a career spanning 20 years across banking where he worked on trading floors to supporting Sovereign Wealth Funds and their asset holdings, and a parallel career from the dot com days of building an oil and gas asset market place to building a SaaS business that solved major logistics issues in Construction, Marine, Events. He now leads the Banking as a Service (Embedded Finance) Proposition for HSBC, where he is helping companies drive new business models through the inclusion of banking services in their offerings.

Session Break: 2:00 PM – 2:15 PM

Session Two: 2:15 PM – 3:15 PM

Topic: API: Connecting Corporates, Software Providers, & Banks

Speakers: Sonal Vaidya – Director Banking Channels – HSBC (Moderator), Tracey Knight – VP of Client Success – Trovata, and Ishan Doray – SVP Client Integration – HSBC

Session Description: Technology brings efficiencies to corporate treasury teams with timely reporting and frictionless payment processing. However, syncing up a company, software provider, and bank can be difficult when each party has different connection standards. Application Programmable Interfaces (APIs) have alleviated this issue by forming standard rules of engagement for all three participants. This session will focus on APIs impact on treasury teams and the trends that treasury teams need to prepare for in the future. Learn from a panel discussion about how APIs can help your treasury team accomplish its technology goals and how to build a partnership between you, your software provider, and your financial institution.

Speaker Information



Sonal Vaidya – Director Banking Channels – HSBC

Sonal Vaidya manages API commercialization and brings with her expertise in multiple industries such as Financial Services, Banking, Insurance, Energy & Utilities, Media, Publishing and Software. She is known for re-engineering and process automation, and her most recent knowledge portfolio includes APIs, Blockchain, Bitcoin, Internet of Things (IoT), Artificial Intelligence (AI), Cloud Computing, to name a few.

Sonal has extensive experience pursuing technology solutions that provide critical insight into future business strategy. She has deep domain expertise across Product management & implementation, Automation, Process re-engineering, Operations. She has developed an impressive track record of successfully leading and growing businesses. She combines visionary thought-leadership and the ability to execute.

Sonal is an Alumna of Cornell University - Johnson School of Business Management for Business strategy. She also is a Physicist by education. As a Physicist, Sonal has a keen interest in astronomy and has her own app for stargazing. She is an active supporter of The David Sheldrick Wildlife Trust (elephant orphanage).

Speaker Information



Tracey Knight – VP of Client Success – Trovata

Ms. Knight evangelizes the benefits of treasury departments' effective use of technology to raise treasury's profile and become a true strategic partner to the business. Currently at Trovata, she is excited to be leading the drive in open banking helping companies get much better use of the "trove of data" that their businesses generate each day. Leading Client Success, she will ensure that clients get value from their subscriptions as she helps build a community around Trovata, clients, banking partners, and the treasury arena at large.

With over 25 years of treasury experience, she has helped hundreds of companies select and implement technology to transform their treasury departments. Experienced as both a practitioner and vendor, she brings a unique combination of knowledge and skills to truly understand a company's current state and help them visualize and realize a transformed future state.

She has a BS in Economics from the Wharton School at the University of Pennsylvania and is a popular and frequent speaker on webinars and local, regional, and national Association of Financial Professional (AFP) events.

Speaker Information



Ishan Doray – SVP Client Integration – HSBC

Ishan has 22 years of transaction banking experience and specialized in cash management for 16 years. He has extensive sales, business consulting, product design and systems integration experience. He also has in depth knowledge on the API, embedded finance technology, and cash management industry standards to meet complex treasury and banking needs.

Ishan holds a Bachelor of Science (Bsc) in Computing from the University of Staffordshire and accredited by SWIFT.

Session Break: 3:15 PM – 3:30 PM

Session Three: 3:30 PM – 4:30 PM

Topic: Financing a Sustainable Future

Speaker: Mark Hillhouse – US Head of Sustainable Finance – HSBC

Session Description: ESG (Environment, Social, Governance) initiatives have sparked new innovations companies to reduce carbon emissions and to transition eventually to a net zero status. Companies will need capital to develop, commercialize and adopt these innovations. This session will focus on the banking industry's role in helping companies navigate their sustainability journeys. Learn about establishing ESG KPIs for your company as well as the financing tools available in the market to support your company's journey.

Speaker Information



Mark Hillhouse – US Head of Sustainable Finance – HSBC

Mark works with teams across the US and the globe to support ClimateTech firms, renewable energy developers, and companies looking to reduce their carbon footprints, increase diversity and improve governance.

He joined HSBC in San Francisco in 2011, became a team leader in 2014, began focusing on sustainable finance in 2015, and moved to Atlanta to lead the team covering Georgia, Tennessee, Alabama and Mississippi in 2017.

Before joining HSBC, Mark led teams at Comerica Bank, worked at GE Capital, and was an officer in the US Air Force. He has bachelor's and Master's degrees from Santa Clara University. In his spare time Mark enjoys travel and a wide variety of outdoor activities, particularly cycling, kayaking, skiing, and backpacking.

Reception: 4:30 PM – 6:00 PM

Menu Information (In Person Attendees)

Lunch:

- Mixed Garden Salad with Italian and Ranch Dressings
- Warm Rolls & Butter
- Chicken Tuscan
- Pasta Primavera
- Chef's Choice of Fresh Garden Vegetables
- Assorted Cookies
- Coffee, Tea, Iced Tea & Lemonade

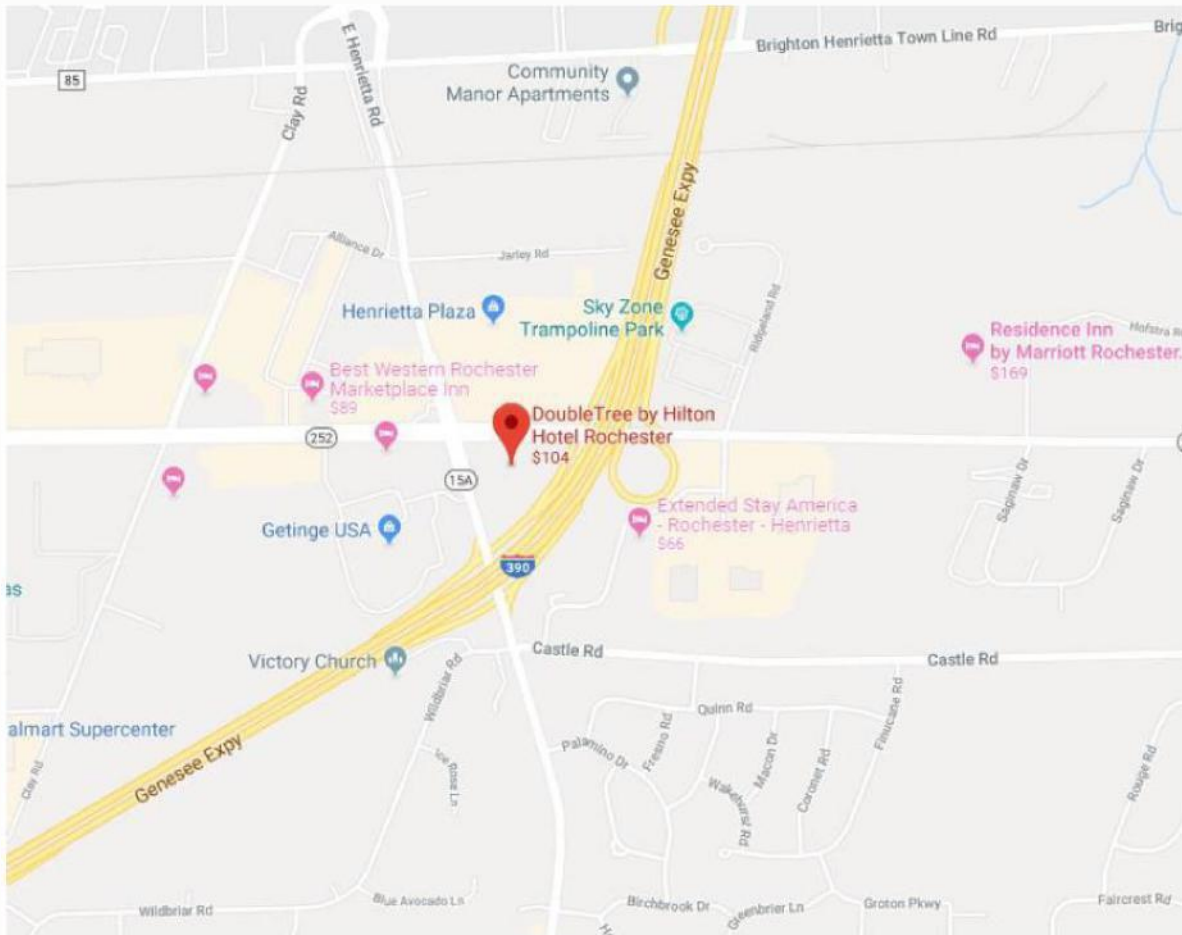
Afternoon Snack:

- Fresh Fruit
- Yogurt
- Granola Bars
- Fresh Baked Cookies
- Brownie Dessert Bars
- Coffee & Tea

Reception:

- Assorted Cheese and Vegetable Displays with Fresh Fruits, Berries and Crackers
- Assorted Call Brand Liquors, Domestic and Imported Beers, Wines, Soft Drinks, Juices and Water

Directions to DoubleTree by Hilton



From the New York State Thruway: Exit 46 to 390N to Exit 14B, East Henrietta Rd. Turn left on Rt. 15A. The hotel is on the right.

From the Greater Rochester International Airport: Exit airport. Turn right to merge onto I-390S. Follow 390S to Exit 14B, East Henrietta Rd. Turn right onto Rt. 15A. The hotel is on the immediate right.

From the North: Take I-590S to I-390S to Exit 14B, East Henrietta Rd. Turn right onto Rt. 15A. The hotel is on the immediate right.

From the South: Take I-390N to Exit 14B, East Henrietta Rd. Turn left onto Rt. 15A. The hotel is on the immediate right.

From the East: Take I-490W to I-590S to I-390S to Exit 14B, East Henrietta Rd. Turn right onto Rt. 15A. The hotel is on the immediate right.

From the West: Take I-490E to I-390S to Exit 14B, East Henrietta Rd. Turn right onto Rt. 15A. The hotel is on the immediate right.
