



ASSOCIATION FOR  
FINANCIAL  
PROFESSIONALS

Western NY

The AFP of Western New York presents its  
2019 Fall Half-Day Conference

# Comedy@ THE Carlson

**Wednesday, September 18<sup>th</sup>, 2019**  
**Located at Comedy @ The Carlson**  
**50 Carlson Rd, Rochester, NY 14610**  
**(585) 426-6339**

## 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!

### **Session 1: 1:00 PM – 2:05 PM**

**Topic:** Blockchain – The Trust and Impact Protocol  
**Speaker:** Daniel Beale, CPA – Senior Manager, JC Jones Advisory Services

Blockchain technology has the potential to transform the way we do business. Finance professionals should stay abreast of this technology as it continues to evolve in ways we never thought possible. This session is intended to be an introduction to the subject. We will cover the rise of Bitcoin and provide a basic understanding of Blockchain technology's principles and attributes. We will also look at Blockchain's potential benefits, limitations and risks. Finally, we will explore real-world cases currently in use and in development.



**Daniel Beale, CPA  
Senior Manager  
JC Jones Advisory Services**

Dan is a Senior Manager with JC Jones Advisory Services providing Profit and Performance Improvement Consulting services. He has over 9 years of experience as a finance professional working with both global and domestic companies. Prior to joining JC Jones, Dan was the Controller at an emerging optics manufacturer where he managed financial reporting activities. His finance and accounting experience includes system implementations, cost accounting, mergers and acquisitions, and Sarbanes Oxley Act compliance. He began his career as a financial auditor at PwC.

**Session Break: 2:05 PM – 2:15 PM**

## **Session 2: 2:15 PM - 3:20 PM**

**Topic:** Credit Insurance – How to Sell More with Less Risk  
**Speaker:** Edward J. Arnold, PhD – President, Trade Credit Insurance Agency, LLC

Dr. Arnold is President of Trade Credit Insurance Agency, LLC, (Credit Insurance Specialty Brokers). He has a Ph.D. in Geography from the University of Buffalo, with a concentration in Trade Finance and a Master's degree in International Business.

Before Ed founded Trade Credit Insurance Agency, he ran the Credit Insurance department for M&T Insurance Agency. Prior to M&T, Ed was the director of the International Division of the ECIDA, where he developed several trade finance products and worked closely with Ex-Im Bank, the SBA, and other entities to promote exports through loans, credit insurance, and information services.

Dr. Arnold has traveled the world on business and lived and worked in both Poland and Germany. He has a wife, a son just off to college, a daughter in high school and currently an exchange student staying with the family.

**Session Break: 3:20 PM – 3:30 PM**

### Session 3:

3:30 PM - 4:35 PM

**Topic:** Finance & Digital Transformation

**Speaker:** Chander Sharma – Founder, Managing Partner, BizXL Solutions

This session will focus on understanding the catalysts for accelerating change and how finance leaders must place increased focus in nurturing a sustainable organization beyond the next few quarters and into the years ahead. Participants will also be introduced to the impact of Digital Transformation and elements of Design Thinking in creating the finance function of the future.



**Chander Sharma  
Founder, Managing Partner  
BizXL Solutions**

Chander Sharma is the Founder and Managing Partner of BizXL Solutions, a boutique management-consulting firm. He brings over two decades of domestic and international experience in solving the toughest business challenges across domains working with some of the largest and best run global organizations. He is passionate about designing human centered products and services that customers want and hence build engagement, brand loyalty and brand advocacy.

Chander brings extensive experience integrating Lean Thinking, Design Thinking, Six Sigma Analytics, Agile Development and Change Management to maximize value creation. Chander is a lead faculty at Rutgers Business School for a mini MBA program called IDEA (Idea Design to Execution Accelerator). He serves on the board of REEP Green Solutions, a non-profit organization that champions the cause of sustainable living. He is a Lean Six Sigma Master Black Belt, having trained/coached/mentored over 500 people globally.

Chander has a Bachelors in Engineering from India and Masters in Business Administration from Cornell University, USA and Queens University, Canada.

**Reception: 4:45 PM – 6:00 PM**

**Raffle prizes will be awarded during the reception!!!**

## **Lunch Menu Information:**

Mixed Field Green Salad  
Farfalle Alla Pesto Pasta  
Roasted Asparagus with  
Butter and Pecorino Romano  
Baked Potato  
Artisan Dinner Rolls and  
Whipped Cream

### Entrees:

Chicken Parmigiana  
Sliced Top Sirloin Marsala

### Beverages:

Coffee/Tea  
Water

## **Reception Menu Information:**

Kubaneh Pull-Apart Breads with Olive Oil, Sesame Eggplant or Zetar Cream  
Seasonal Mixed Greens  
Vegetable Crudites with Zetar Cream or Tomato Tahini  
Radio Hummus with Tahini, Lemon, Chili, Olive Oil or Laffa  
Chef's Hummus  
Crispy Halloumi Cheese with Fruits and Herbs  
Crispy Chicken Meatball Platters  
Charred Chicken Wing Platters  
Moroccan Taco Platters

### Beverages:

Assorted Beer/Wine/Spirits

## **Directions to Comedy @ The Carlson:**



***From the North:*** Take I-590 S to Exit 6 for Blossom Road. Turn right onto Blossom Road. Turn right onto Carlson Road. Comedy @ The Carlson will be located on your left.

***From the South:*** Take I-390 N to Exit 15 to merge onto I-590 N toward Downtown/Rochester. Take Exit 6 for Blossom Road. Turn left onto Blossom Road. Turn right onto Carlson Road. Comedy @ The Carlson will be located on your left.

***From the West:*** Take I-90 E to Exit 47 for I-490 toward NY-19/Leroy/Rochester. Take Exit 20 toward Winton Road. Merge onto Norris Drive. Use the left 2 lanes to turn left onto S Winton Road. Turn left onto University Ave. Take a sharp right onto Blossom Road. Turn left onto Carlson Road. Comedy @ The Carlson will be located on your left.

***From the East:*** Take I-90 W to Exit 45 for I-490 W toward Rochester. Take Exit 20 to merge onto University Ave toward Winton Road. Take a sharp right onto Blossom Road. Turn left onto Carlson Road. Comedy @ The Carlson will be located on your left.

**Reception to follow at Radio Social, located directly next door to Comedy @ The Carlson (Address: 20 Carlson Road).**