



The AFP of Western New York presents its
2025 Fall Half-Day Conference

Sponsored By



Wednesday September 24th, 2025
Located at Casa Larga



2287 Turk Hill Rd, Fairport NY 14450
(585) 223 - 4210

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 is requesting approval for up to TBD CTP/CCM and TBD 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!

Opening Remarks: 12:50 PM – 1:00 PM

Session One: 1:00 PM – 2:00 PM

Topic: Emotional Intelligence for Leaders

Speaker: Marco Oliverio, Leadership Development Consultant- Advance Partners

Session Description: How often do you look inward and take an honest look on how you show up with people? This session will focus on emotional intelligence, helping you to manage emotions, communicate effectively, and build stronger relationships. The exercises will help uncover opportunities for growth and offer practical tools to improve leadership abilities.

Speaker Information



Marco Oliverio
Leadership Development Consultant
Advance Partners

With more than 10 years of experience in leadership development and organizational effectiveness, Marco specializes in helping individuals transition into leadership roles and thrive once they get there. At Paychex, he designed and facilitated programs for emerging leaders, senior leaders, and talent pipelines, aligning leadership competencies with business strategy. His expertise spans facilitation, coaching, succession planning, and building leader readiness. Based in Rochester, NY, Marco brings a practical and people-focused approach, helping organizations strengthen culture while preparing leaders for the challenges of today's workplace.

Session Break: 2:00 PM – 2:15 PM

Session Two: 2:15 PM – 3:15 PM

Topic: Using Virtual Accounts to unlock strategic treasury capabilities

Speaker: Mone' Ross, Vice President of Cyber Assessments & Exercises– JPMorgan Chase

Session Description: In today's rapidly evolving digital landscape, cybersecurity is not just a technical challenge—it's a strategic imperative. This interactive session immerses participants in the role of decision-makers, guiding a company through real-world cybersecurity scenarios. Attendees will collaborate in small groups, confronting threats, evaluating risks, and choosing best practices that shape the company's future. Each decision will lead to different outcomes, highlighting the impact of proactive security measures, incident response strategies, and organizational culture on overall resilience. Whether you're a seasoned professional or new to cybersecurity, this session will deepen your understanding of key concepts and empower you to make informed choices that protect your organization.

Speaker Information



Mone' Ross

**Vice President of Cyber Assessments & Exercises
JPMorganChase**

Mone' Ross is Vice President of Cyber Assessments & Exercises at JPMorganChase, where she leads innovative client engagements and crisis simulations that strengthen resilience and decision-making. With experience spanning the U.S. Coast Guard Cyber Command, Department of Homeland Security, and U.S. House of Representatives, Mone' brings a unique cross-sector perspective to cybersecurity. Originally from Detroit, Mone' now resides in Washington, DC.

Session Break: 3:15 PM – 3:30 PM

Session Three: 3:30 PM – 4:30 PM

Topic: Cash Flow Intelligence

Speaker: Parin Patel, Senior Product Manager – Liquidity & Accounts Solutions

Session Description: In this session, we'll explore how cash flow forecasting tools can be utilized to support financial planning and decision-making. We'll look at how historical data can be used to generate forecasts through machine learning, and how these insights can help users better understand and manage their cash flow.

Speaker Information



Parin Patel

**Senior Product Manager – Liquidity & Accounts Solutions
JPMorganChase**

Parin Patel is a Senior Product Manager in the Liquidity & Account Solutions organization, covering CFI and Physical CashCon for the CB clients in US and Canada. Parin partners with Commercial Banking clients to support CFI setups and guide them through the CFI experience, as well as develop solutions for cash concentration structures. Prior to this role, Parin spent four years in liquidity product management at Goldman Sachs, where she managed deposit portfolios.

Reception: 4:30 PM – 6:30 PM

Menu Information (In-Person Attendees)

Lunch:

- Traditional Cesar Salad
- Antipasto Salad
- Garlic Mashed Potatoes
- Orecchiette Pasta with a Creamy Vodka Blush Sauce
- Sauteed Seasonal Medley
- Basil Pesto Chicken Breast
- Italian Beef Au Jus
- Assorted Domestic and Imported Beer and Wine, Soda, and Water
- Fresh Brewed Coffee and Herbal Tea

Reception:

- Assorted Domestic and Imported Beer and Wine, Soda, and Water
- Mini Spiced Maryland Crabcakes

- Caprese Bites