



ASSOCIATION FOR  
FINANCIAL  
PROFESSIONALS  

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Western NY

The AFP of Western New York presents its  
Spring Half-Day Conference 2021 Webinar Series

**Sponsored By:**



**May 12th, 2021  
12:00pm to 1:30pm  
VIRTUAL EVENT**

**WEBINAR ACCESS DETAILS TO BE PROVIDED SEPARATELY TO EVENT REGISTRANTS**  
(This event will be the first of three events in place of our Spring Half-Day Conference)

**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.

## Annual Meeting: 12:00 PM – 12:15 PM

**Agenda:** Approve Last Year's Meeting Minutes, Approve FY22 Proposed Budget, Approve FY22 Proposed Bylaws, Approve FY22 Proposed Board of Directors, Review FY22 Schedule of Events

## Presentation: 12:15 PM – 1:30 PM

**Topic:** Planning your ERP Journey in our “New Normal”

**Speakers:** Aneri Shah - Senior Vice President and ERP Strategy Consultant - Wells Fargo & Casey DeMarco - Vice President and Treasury Management Consultant – Wells Fargo

**Session Description:** This session will provide a vendor agnostic overview of the ERP journey. Walk away with new ideas and best practices on how to best navigate through the ERP lifecycle in our new normal. The outcome of this collaborative session yields a nice overview for those considering purchasing, implementing or upgrading their current financial system of record and serves as an opportunity to collaborate with your peers as you prepare for next steps in the ERP journey within your organization.

### Speaker Information:



**Aneri Shah - Senior Vice President and ERP Strategy Consultant - Wells Fargo**

Aneri Shah brings over 22 years of experience in full ERP life-cycle implementation consulting, engagement management, operational optimization and customer relationship management. She serves as a mentor and trusted advisor for companies in a strategic capacity with respect to ERP Financial integrations and ERP implementation best practices.



**Casey DeMarco - Vice President and Treasury Management Consultant – Wells Fargo**

At Wells Fargo Casey works with companies across Western & Central NY and Eastern Canada. Casey joined Wells Fargo in 2018 and has over 10 years of financial services experience in Corporate and Commercial Banking across treasury management sales, relationship management,

and operations working for Citi and HSBC. Casey earned her MBA in Finance as well as her Bachelors of Science in Business Administration from Niagara University.

***This Conference has been approved for up to 1.5 CTP/CCM and 1.5 FP&A recertification credits by the Association for Financial Professionals at the rate of one credit for each 50 minutes of attendance.***