



The AFP of Western New York presents its
Spring 2026 Half-Day Conference & Annual Meeting

Co-Sponsored By



Wednesday May 20, 2026
Located at Locust Hill Country Club
2000 Jefferson Road, 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.

Program Registration and Lunch: 12:00 PM – 1:00 PM

Come early, it's a great chance to network!

Session 1: 1:00 PM – 2:00 PM

Topic: The AI-Ready Treasury: Data Lakes, Agents, and MCP

Speaker: Reggie Baker, Senior Sales Director

Session Description: Treasury has quietly become one of the most data-rich functions in the enterprise. Every bank transaction, every payment, every liquidity event flows through treasury first — which means treasury is also first in line for the biggest shift in finance since the move to the cloud: the arrival of agentic AI. The problem is that most treasury data still lives in bank portals, spreadsheets, and point-to-point integrations that were never designed for AI. Before agents can help, the data has to be structured, normalized, governed, and reachable. That is the job of a treasury data lake, and it is the single most consequential architectural decision the function will make this decade.

In this session, we will unpack what agentic treasury actually looks like, why the data lake is the foundation, and how a new open standard — the Model Context Protocol (MCP) — is reshaping how AI agents connect to financial systems. Attendees will leave with a practical, vendor-neutral framework for assessing their own data readiness and a clear view of where the office of the CFO is heading next.

What attendees will take away:

- A working mental model for how AI agents interact with treasury data.
- A plain-English explanation of MCP and why it matters for finance.
- The architectural case for a treasury data lake — what it is, what it is not, and why it matters more than any single application.
- Five practical steps to assess and improve data readiness inside their own function.
- A view of the four stages of treasury evolution and how to tell where your team sits today.

Speaker Information



Reggie Baker has nearly a decade's experience consulting with Enterprises, SMBs, and Public entities in various capacities (AI/ML, Cloud MP GTM, etc.). He joined Trovata in July of 2023 as a Sales Director and is responsible for helping Trovata customers build and navigate roadmaps to attain their unique objectives.

Session 2: 2:15 PM – 3:15 PM

Topic: Unmasking the Digital Shadows: Navigating Today's Cyber Landscape

Speaker: Lisa Beury-Russo, Senior Cyber Engagement Lead – Wells Fargo

Session Description: In today's digital landscape, staying ahead of cyber threats is crucial. “Unmasking the



Digital Shadows: Navigating Today's Cyber Landscape” will help you understand the cyber threat landscape, including the “League of Cyber Villains” and the anatomy of common attacks. You'll also learn best practices to safeguard your organization and assets – empowering a security-smart culture for everyone.

Speaker Information

Lisa Beury-Russo
Senior Cyber Engagement Lead
Wells Fargo

Lisa joined Wells Fargo in 2025 with more than 20 years of experience in cybersecurity and emergency preparedness across the public and private sectors.

In her current role within Cyber Client Advisory, Lisa supports the cybersecurity needs of Wells Fargo clients and customers by helping them navigate the evolving cyber threat landscape through industry best practices. By leveraging Wells Fargo cyber capabilities, the Cyber Client Advisory team strives to inform and enable Wells Fargo clients and customers to mitigate the growing cyber risk.

Lisa frequently speaks on cybersecurity topics at industry and government conferences, expert exchanges, and media interviews. She has been quoted in publications such as the Wall Street Journal, Federal News Network, and Government Matters.

Prior to joining Wells Fargo, Lisa was a senior leader at the U.S. Cybersecurity and Infrastructure Security Agency (CISA), where she managed nationwide programs to strengthen the security and resilience of government and industry partners. Her work included leading global cyber exercises and spearheading public-private collaboration to improve incident response plans and procedures. Lisa holds a Master's Degree in International Security and is a Certified Information Systems Security Professional (CISSP).

Session 3: 3:30 PM – 4:30 PM

Topic: Economic Update

Speaker: Tim Quinlan, Managing Director & Senior Economist – Wells Fargo Corporate & Investment Banking

Session Description: In this segment, Tim Quinlan, Managing Director and Senior Economist for Wells Fargo Corporate & Investment Banking, will unpack our latest thinking in terms of what to expect from the Federal Reserve and what that means for the broader national economy.

Speaker Information



Tim Quinlan
Managing Director, Senior Economist
Wells Fargo

Tim is a Managing Director and Senior Economist with Wells Fargo Corporate and Investment Banking. Based in Charlotte, North Carolina, he provides analysis on U.S. 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 is a member of the National Association for Business Economics and the Canadian Association for Business Economics. Tim has a B.A. from Siena College in Albany, New York.

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
 - Sausage Stuffed Mushrooms
 - Bacon Wrapped Scallops
 - Spanakopita