



ASSOCIATION FOR  
FINANCIAL  
PROFESSIONALS  

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Western NY

The AFP of Western New York presents its  
2018 December Lunch Meeting

**Wednesday, December 12<sup>th</sup>, 2018**

**Sponsored By:**

**ZANDERS**  
TREASURY ■ RISK ■ FINANCE

**Located At:**

***City Grill***

***384 East Ave.***

***Rochester, NY, 14607 (585) 222-2489***

**THE ASSOCIATION FOR FINANCIAL PROFESSIONALS OF WESTERN NY**

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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.

## Program Registration & Lunch: 11:30 AM – 2:00 PM

Lunch will be provided around noon. Come early, it's a great chance to network!

## Presentation: 12:30 PM – 1:45 PM

**Topic:** *FinTech and Treasury: A Match Made in Heaven?*

**Speaker:** Keith Bergman, VP & Director at Zanders US – Global Treasury Advisory

Today's treasury of Risk Management, Cash & Liquidity Management, Corporate Financing and strong governance and controls has been the norm for the last 20-30 years. With every 5 years in passing there's a new focus which impacts corporate treasury. Today's focal points for treasury, risk and finance are regulatory changes such as BEPS and IFRS9, geo-political risks, cybercrime and exponential technology. But what's going to impact corporate treasury tomorrow and beyond? And how will this impact materialize?

In collaboration with the AFP, Zanders has created a whitepaper on the potential impact of exponential technology on corporate treasury and the evolution towards a next treasury maturity stage. In our presentation, we will share our view on the future of treasury, especially in the context of mega trends, such as big data & analytics, artificial intelligence, blockchain and APIs, and discuss how treasuries are being impacted. We will also share use cases already being explored and piloted.

Three learner outcomes or takeaway points:

- Update on today's focus points for treasury, risk and finance
- Explore what the next level of 'treasury maturity' really means
- Share practices, applications and our view on the future of corporate treasury

## Speaker Information:



**Keith Bergman**  
VP & Director – Zanders US, Global Treasury Advisory

Keith Bergman is a VP & Director at Zanders US where he is responsible for the corporate treasury & risk practice. He has over 35 years' experience working with banks and multinational corporations domestically and abroad. Keith has worked in technology, developing treasury software, and as a practitioner has been an International Treasury Accounting Controller for a \$60B multinational corporation where he helped improve operational efficiencies, managed treasury accounting operations and oversaw the TMS application. He holds a BS degree in Accounting and a MBA degree in finance.

*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*

# Menu Information:

## Lunch Menu

### *Buffet:*

Mixed Green Salad with Balsamic Vinaigrette  
Rolls & Butter

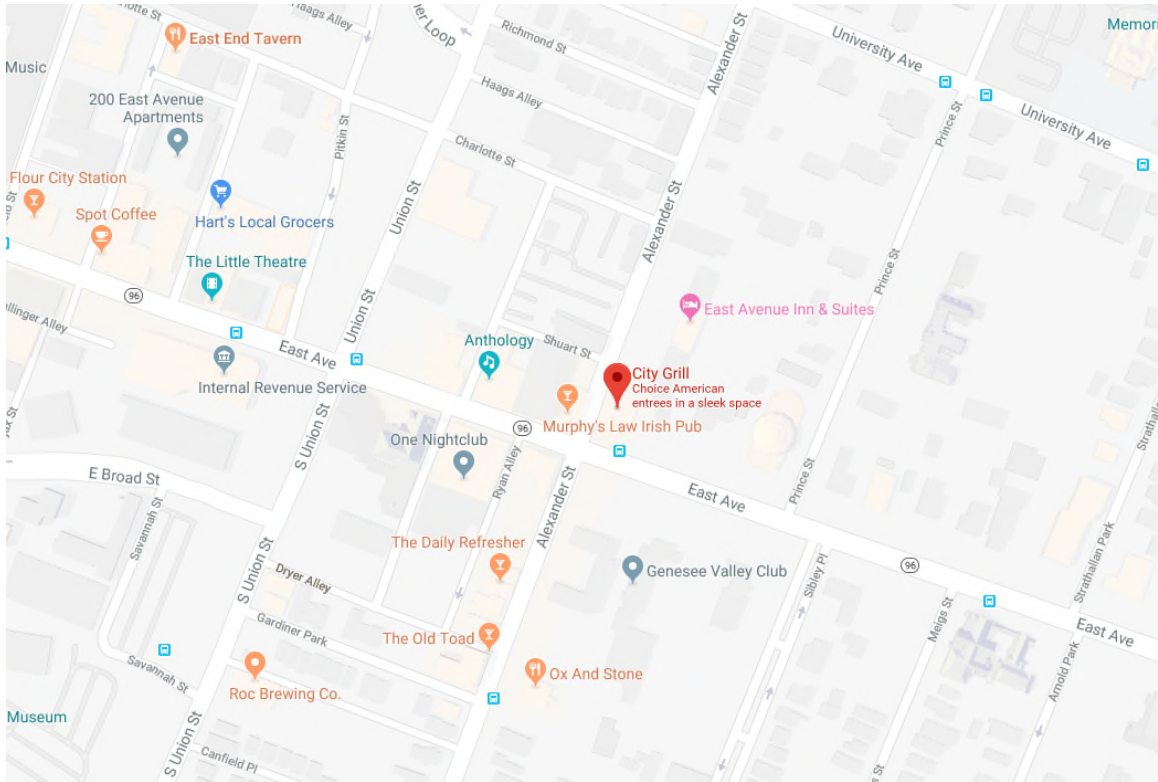
Chicken Cutlets  
Roast Beef  
Penne with Vodka Sauce  
Chef's Choice Vegetable  
Chef's Choice Starch

### *Dessert:*

Ice Cream Sundae  
Coffee



# Map/Directions to City Grill:



## From the North:

Take NY-590 S to Exit 7 for NY-286/Browncroft Blvd. Turn right onto Browncroft Blvd. Continue onto Atlantic Ave. Turn left onto Merriman Street. Turn right onto East Ave. City Grill will be on the right.

## From the South:

Take I-390 N to Exit 15 to merge onto I-590 N toward Downtown/Rochester. Take Exit 5 for I-490 W. Take Exit 19 for Culver Road, and turn right. Turn left onto East Ave. City Grill will be on the right.

## From the West:

Take I-90 E to Exit 47 for I-490 toward NY-19/Leroy/Rochester. Continue onto I-490 E to Exit 13 for Inner Loop toward Downtown E. Continue onto Inner Loop and turn right onto Union Street. Turn left onto East Ave. City Grill will be on the left.

## From the East:

Take I-90 W to Exit 45 for I-490 toward Rochester. Continue onto I-490 W to Exit 19 for Culver Road. Turn right onto Culver Road. Turn left onto East Ave. City Grill will be on the right.