



The AFP of Western New York presents its
Spring 2025 Half-Day Conference & Annual Meeting

Sponsored By



Wednesday May 14, 2025
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 3.6 CTP/CCM and 3.6 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

Annual Meeting: 12:45 PM – 1:00 PM

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

Agenda: Approve Last Year's Meeting Minutes, Approve FY26 Proposed Budget, Approve FY26 Bylaws, Approve FY26 Proposed Board of Directors, Review FY26 Schedule of Events

Session 1: 1:00 PM – 2:00 PM

Topic: Merchant Services & Payments Innovation

Speaker: Eric Goldberg, Lead Merchant Services Consultant – Wells Fargo

Session Description: Businesses today face growing pressure to accelerate cash flow, reduce receivables friction, and keep up with evolving payment technologies. Instead of overhauling systems, leveraging expertise and technology tools from trusted advisors can vastly improve efficiency and working capital.

Speaker Information



Eric Goldberg
Lead Merchant Services Consultant
Wells Fargo

With over a decade of experience advising organizations across industries, Eric helps clients modernize receivables through consultative review and tech-driven solutions. He'll share practical insights on streamlining A/R - including electronic billing, multi-channel payments, payment file consolidation, and automated payment & bill matching. Based in the New York metro area, Eric collaborates with Bankers and Treasury teams to align payment strategies with financial goals. He will also highlight payment trends and data relevant to upstate New York.

Session 2: 2:15 PM – 3:15 PM

Topic: Economic Update

Speaker: Tim Quinlan, Director & Senior Economist – Wells Fargo Securities, LLC

Session Description: The upshot of recent tariff announcements is an escalation that redefines America's role in global trade. A roughly tenfold increase in the effective tariff rate to north of 20% from just over 2% heightens the risk the U.S. economy slips into recession this year. Whether the long-term wager on a return to a golden age of U.S. manufacturing pays off remains uncertain, but the change in the near-term prospects for the economy are not. In this segment, Tim Quinlan, senior economist for Wells Fargo Corporate & Investment Banking, will discuss how tariffs could inject a bit of stagflation into the U.S. economic forecast and what that means for policymakers at the Federal Reserve.

Speaker Information



Tim Quinlan
Senior Economist
Wells Fargo

Tim is a Director and Senior Economist with Wells Fargo Securities. 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.

Session 3: 3:30 PM – 4:30 PM

Topic: Building the Right Team for Growth: Strategies for Success in Western NY

Speaker: Mark Rizzo, Commercial Banking Leader, Upstate NY & Eastern Canada – Wells Fargo

Session Description: In this presentation Mark Rizzo will discuss the key factors in building a successful team in Western NY. He will cover topics such as hiring strategies, marketing the brand on LinkedIn to attract top talent, utilizing talent pools effectively, and finding the right mix of skills across the team. By focusing on these essential elements, businesses can ensure they have the right team in place to drive growth and success in the competitive Western NY market. Join us to learn valuable insights and strategies for building a winning team in this dynamic region!

Speaker Information



Mark Rizzo
Commercial Banking Leader
Wells Fargo

Mark Rizzo is a senior banking executive with extensive experience in relationship management, strategic sales, as well as building and leading high-performance teams. As a Commercial Banking Leader at Wells Fargo, Mark is responsible for leading a team of talented relationship managers who are focused on delivering best-in-class financial solutions to a diverse group of middle market and mid-corporate companies across the Upstate NY region. Mark is a native of Buffalo, New York; and throughout his career, he has been highly active in his community serving on several not-for-profit boards and advisory councils. He is a current member of the University at Buffalo School of Management Dean's Advisory Council, where he was recognized by the school for outstanding service by an alum. He is also the immediate past President of the Kids Escaping Drugs Board of Directors. Mark obtained his undergraduate degree (accounting and finance) and MBA (with distinction) from the University at Buffalo. He is also a 2018 graduate of the Execution Education Leadership Program at the University of Pennsylvania, Wharton School of Business.

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

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