



ASSOCIATION FOR
FINANCIAL
PROFESSIONALS

Western NY

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

March 7th, 2018

Located at:



Hilton Garden Inn Rochester/University & Medical Center

30 Celebration Drive, Rochester, NY 14620

Phone: (585)424-4404

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.

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: *Establishing Investment Accounting and Reporting Best Practices*
Speaker: Logan Brown, SaaS Enterprise Sales Professional – Clearwater Analytics

More than ever, accounting and finance professionals operate within a very complex world. Accounting rules change. Markets swing. Prices move. Credit ratings shift overnight. Auditors scrutinize. At the same time, Boards must be briefed and they expect all portfolio data to be accurate – at their convenience. With growing investment balances across the industry, it's imperative that the relevant stakeholders have access to automated, consolidated investment information that is actionable and timely in order to react to market moves, senior management questions, accounting rules, auditor inquiries, and to make intelligent investment decisions.

Speaker Information:



Logan Brown

SaaS Enterprise Sales Professional – Clearwater Analytics

Logan specializes in helping corporations solve their investment integration, accounting, and reporting challenges through modern technology. Logan has been with Clearwater Analytics for over 5 years and manages business development efforts for corporate investors in the Eastern U.S. Logan has a BS in Management with an entrepreneurial emphasis from Brigham Young University. He lives in Boise, Idaho with his wife and three kids.

*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

Artisan Rolls & Butter

Mixed Green Salad with Artichoke Hearts, Grape Tomatoes and Two Dressings

Roasted Red Potatoes with Rosemary Garlic

Broccoli with Garlic Butter

Entrees:

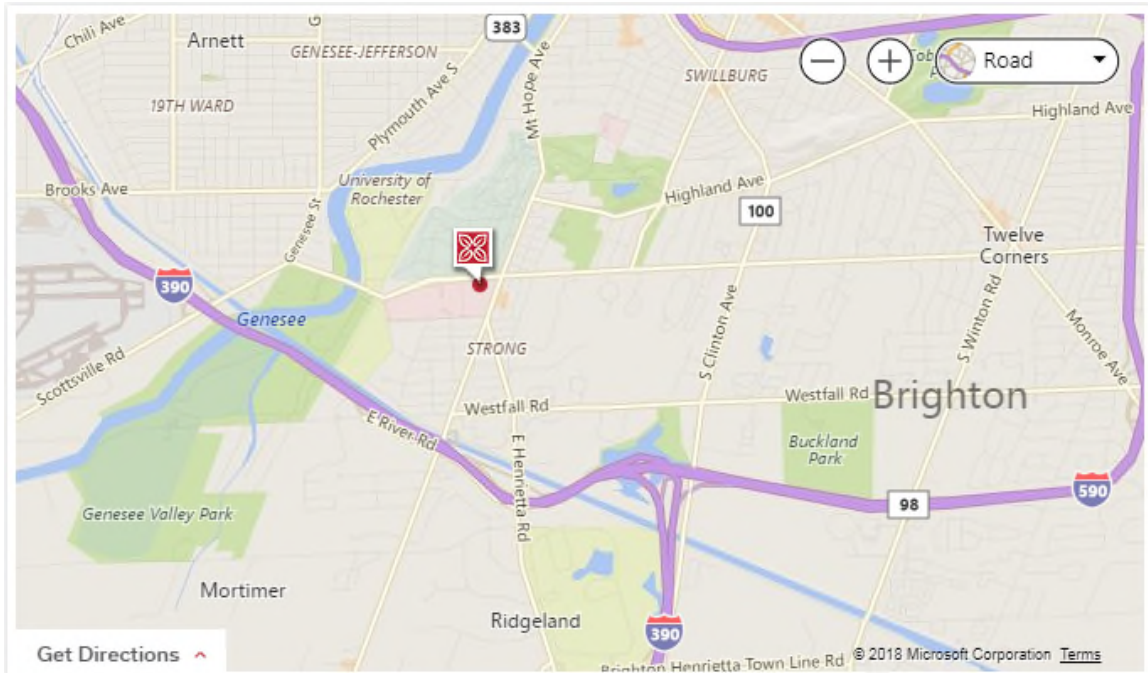
Herb Roasted Chicken with Spinach, Mozzarella, Fresh Tomato Ragu

Pan Roasted Salmon with Lemon-Pesto Cream

Dessert:

Vanilla Cheesecake with Strawberry Puree

Map to Hilton Garden Inn:



From the North: Exit 390 South at 16A. Take ramp right toward W. Henrietta Road. Turn left onto Rt. 15/W. Henrietta Road. Continue onto Mt. Hope Avenue. Turn left onto Celebration Dr. Destination will be on your right.

From the South: Exit 390 North at Exit 16. Turn right onto Rt. 15/W. Henrietta Road. Continue onto Mt. Hope Avenue. Turn left onto Celebration Drive. Destination will be on your right.

From the NYS Thruway: At exit 46, take Rt. 390 North. At Exit 16, turn right onto Rt. 15/W. Henrietta Road. Continue onto Mt. Hope Avenue and left onto Celebration Drive. Destination will be on your right.