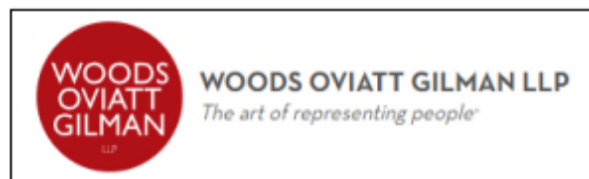




The AFP of Western New York presents its
December 2025 Meeting

In Partnership With



Wednesday December 17th, 2025
Located at Pane Vino

3400 Monroe Ave, Rochester NY 14618
(585) 586-7000

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 is requesting approval for up to 1.2 CTP/CCM and 1.2 FP&A recertification credits by the Association for Financial Professionals at the rate of one credit for each 50 minutes of attendance.

Registration: 12:00 PM

Lunch: 12:15 – 1:00 PM

Program: 1:00 PM – 2:00 PM

Topic: A.I. in Financial Planning and Accounting: Opportunities, Risks, and Legal Compliance

Speaker: Katarina B. Polozie, CIPP/ US, AIGP, and Partner – Woods Oviatt Gilman LLP, Business and Finance Department, and Practice Group Leader for the Data Privacy and Data Security Group and Trent Bolar, counsel- Woods Oviatt Gilman LLP

Session Description: Artificial Intelligence is transforming the financial planning landscape—streamlining operations, enhancing predictive analytics, and improving client engagement. Yet, with innovation comes complexity. This session explores the dual dimensions of AI adoption: the strategic opportunities for financial planners and accountants and the legal and regulatory challenges that accompany them. We will examine key compliance considerations, including data privacy, fiduciary obligations, algorithmic bias, and emerging AI regulations. Attendees will gain practical insights on how to leverage AI responsibly while mitigating legal risk and maintaining client trust.

Speaker Information



Kate Polozie
Partner
Woods Oviatt Gilman LLP

Kate Polozie is a partner at Woods Oviatt Gilman and practice group leader for the Data Privacy, Data Security and AI Governance practice area. She works with organizations to design and implement AI Governance Plans that meet emerging regulatory requirements, ethical standards, and operational realities. Her approach ensures transparency, accountability, and risk management in AI-driven systems—critical for industries where trust and compliance are paramount. In addition to her leadership in AI governance, Kate has extensive experience in mergers and acquisitions and complex commercial transactions, giving her a unique perspective on how technology and regulation intersect in high-stakes business decisions. Known for her ability to translate complex legal and technical issues into clear, actionable strategies, she helps clients navigate change with confidence and clarity.



Trent Bolar
Counsel
Woods Oviatt Gilman LLP

Trent Bolar is Of Counsel at Woods Oviatt Gillman and a member of the Data Privacy, Data Security and AI Governance practice area. He helps businesses develop and implement ethical AI governance frameworks that align with current laws, regulations, and industry standards. In addition to focusing on AI governance, Trent also counsels' clients on AI patent matters, giving him a distinct perspective on AI development, deployment, and use. As an organized and creative problem-solver, he excels at applying a comprehensive governance approach to guide diverse teams through complex, agile projects.