The AFP of Western New York presents its
Winter Half-Day Conference

In Partnership With

Wednesday, February 12th, 2025
Located at Hampton Inn & Suites Rochester Downtown

101 S Union St, Rochester NY 14607

(585) 450-3801

****Complimentary Parking in Hotel Surface Lot & Strong Museum Garage****

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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 4.8 FPAC 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

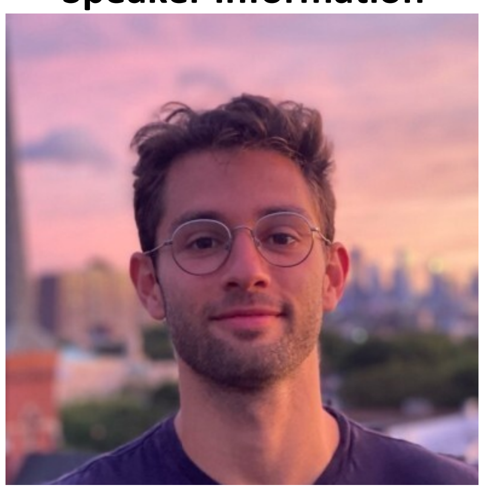
Session # 1: 1:00 PM – 2:00 PM

Topic: Future-Proof Your Treasury: How to Tackle Tech Skills Gap

Speaker: Zach Stimler, Director of Partner Success – Trovata

Session Description: The treasury function is evolving rapidly, but a significant skills gap is holding teams back – 47% of organizations report a lack of technical expertise as a barrier to growth. Today's treasurers are expected to master tools like APIs and generative AI to deliver strategic insights. The treasury technology landscape is diverse, encompassing legacy providers, innovative newcomers, and cutting-edge systems that address evolving business needs. In this session, discover how treasury teams can transform operational challenges into opportunities, embracing technology to drive efficiency and innovation – no computer science degree required.

Speaker Information



Zach Stimler
Director of Partner Success
Trovata

Zach heads up growth for Trovata's industry-defining self-serve offering. Before joining Trovata, Zach spent 4 years building the self-serve revenue function at Quora and, most recently, developed the foundational GTM strategy for Ribbon Health, an enterprise healthcare data platform. A resident of NYC, you'll find Zach circumventing pedestrians on his long-runs, learning to play jazz piano, or cooking southern Italian food (heavy on the calabrian chili) for his friends and family.

Session # 2: 2:15 PM – 3:15 PM

Topic: A Nimble Approach to Managing Liquidity & Investments in Any Monetary Cycle

Speaker: Tom Severance, Head of Global Account Management and Sales – ICD

Session Description: In recent years, the dynamic nature of global financial markets has proven particularly challenging for treasury and finance teams to navigate. Now in 2025, added uncertainty over geopolitical conflicts, tariffs, interest rates, and economic growth are top-of-mind for many practitioners. But despite the challenges of modern markets, there are still plenty of opportunities for organizations to effectively steward their liquidity. In this session, ICD will discuss best practices for treasury teams to successfully manage their cash and investments in a fully-compliant, risk-reduced, and yield-optimized fashion.

Questions Answered:

- What are the modern strategies used by treasury to overcome market challenges and capitalize on current opportunities in liquidity / investment products?
- What types of technologies and workflows can be used to enhance the accuracy, efficiency, and transparency of treasury's liquidity and investment portfolio?

Speaker Information

Tom Severance
Head of Global Account Management and Sales
ICD

Tom Severance joined ICD in 2020 to lead global account management and sales as a member of ICD's executive management team. He is responsible for building the teams who are guiding ICD prospects and clients globally and for leading ICD's expansion into new markets. Tom brings over 25 years of experience in financial services with a proven track record in growth. His business direction and vision, contributions to product development and natural team building skills have led account and sales teams through extraordinary periods of growth. Prior to joining ICD, Tom served as Chief Revenue Officer for Qontigo (previously Axioma), where he led the sales and marketing of innovative SaaS solutions for asset managers, hedge funds, asset owners and banks. Combining his leadership and commercial acumen, he also led teams at Markit, QuIC Financial Technologies, Mysis, Algorithmics and Bloomberg.

Session # 3: 3:30 PM – 4:30 PM

Topic: Fraud, Controls, and Payment Security

Speaker: Paul Galloway, CFA, Senior Director, Advisory Services – Strategic Treasurer

Session Description: In this session, we will explore the latest trends and techniques in payment fraud, highlighting emerging risks and the methods criminals use to exploit vulnerabilities. Attendees will gain valuable insights into strengthening their organization's fraud prevention strategies and improving internal controls to safeguard against financial loss.

Speaker Information

Paul Galloway, CFA
Senior Director, Advisory Services
Strategic Treasurer

Paul Galloway is a Senior Director at Strategic Treasurer, coming alongside and advising clients facing real-world treasury issues. With extensive experience in investment research and decision making, complex modeling, and risk management, he is known for leading teams of professionals, providing solutions to complex problems, building relationships with business leaders, and coming alongside others to help them achieve their goals.

His experience stretches across multiple industries and roles, lending both depth and breadth to his understanding of client concerns. Prior to joining Strategic Treasurer, Paul worked as an entrepreneur, in treasury management, as an institutional custodian, in strategic analysis and decision making as well as an independent consultant. Most recently, he spent several years at an insurance company, setting up a treasury function that had not previously existed including controls, technology needs, bank optimization and staffing needs.

Through these experiences, Paul has gained nuanced understanding of the pain points and pitfalls treasurers face and is skilled at helping both new and established departments navigate complicated problems. He has accumulated knowledge of capital markets, valuation approaches, portfolio management, mergers and acquisitions, and the specific concerns of various industries such as insurance, regulated utilities, and agribusiness.

Paul earned a BS in Family and Consumer Sciences/Human Sciences from Iowa State University, followed by an MBA, Finance from the University of Iowa. He is a Chartered Financial Analyst (CFA) and a Persian Gulf War veteran, United States Marine Corps.

Menu Information (In-Person Attendees)

Lunch Buffet Menu:

- Warm Rolls with Whipped Butter
- Chef’s Choice Seasonal Salad
- Pesto Roasted Chicken & Adobo Marinated Flank Steak
- Mixed Greens & Hearts of Romaine
    - Toppings Include: Grape Tomato, Sliced Red Onion, Sliced Cucumber, Crumbled Bacon, Saved Carrot, Fried Chickpeas, Sunflower Seeds, Sourdough Croutons, Saved Parmesan, and Shredded Cheddar
- Chef’s Choice Seasonal Flatbread (Meat & Vegetarian Option)
- Bottled Water, Assorted Soft Drinks, Iced Tea, Coffee, and Hot Tea
- Assorted Cookies & Brownies (Afternoon Break)
- Fresh Fruit Skewers, Individual Yogurt Parfaits with House Granola, and Assorted Flavor Smoothies (Afternoon Break)

Reception Menu:

- Butter Chicken Meatballs with Tomato Gravy
- Blue Crab Puffs
- Buffalo Chicken & Cheddar Dip with Warm Corn Tortilla Chips
- Assorted Beer, Wine, and Liquor

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