



ASSOCIATION FOR  
FINANCIAL  
PROFESSIONALS  

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Western NY

The AFP of Western New York presents its  
2017 November Lunch Meeting

**Wednesday, November 15<sup>th</sup>, 2017**

**Located at:**



**Via Mina (Formerly Pomodoro Grill)**

**3400 Monroe Ave.**

**The Pittsford Colony Plaza**

**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.

**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:** Developing a Treasury Roadmap - Making Cash Management, Cash Forecasting and Risk Management Strategic Priorities

**Speaker:** Craig Chapman, Manager, Treasury & Capital Markets, Actualize Consulting

The presentation is aimed to highlight the typical issues Treasury teams face with the core functions, understand why they need to be addressed and the analytical tools to create a roadmap. The level of detail of a roadmap will drive the success of the plan, raise the decision points and support execution. The areas of cash management, forecasting and risk are fundamental to Treasury and the audience will learn how to create a roadmap to route their activities to efficiency and best practice.

## **Speaker Information:**



**Craig Chapman**  
**Manager, Treasury & Capital Markets, Actualize Consulting**

Mr. Chapman is a Manager at Actualize Consulting and has over 19 years of professional experience implementing complex treasury solutions as part of treasury software vendors and as a consultant. His focus has been on working with companies to select and implement treasury technology to transform their treasury departments. He has provided process, strategy, controls and technology assistance to companies in all aspects of global cash management, payments and treasury management activities. Mr. Chapman has extensive hands-on experience in project management, business process redesign, treasury system implementation, testing and managing project execution.

*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**

*Attendees will have option of:*

Penne Vodka,

Stuffed Chicken Breast, or

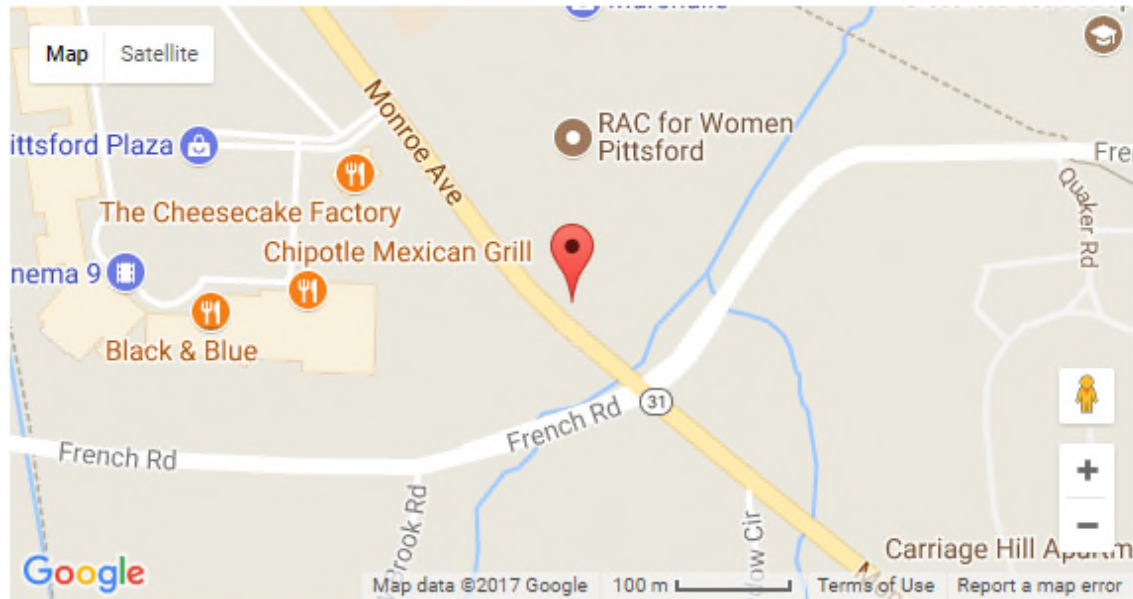
Grilled Salmon

Dessert (Included)

House Made Cookies and Beverages (Available Upon Request)



# Map to Via Mina (Formerly Pomodoro Grill):



Via Mina  
3400 Monroe Ave - 14618  
Pittsford-NY

## From the West:

Take I-90 East to Exit 46 for I-390 toward Rochester/Corning. Keep left at the fork; follow signs for I-390 N/Rochester. Keep left, follow signs for Interstate 390 N/Rochester and merge onto I-390 N. Take Exit 15 to merge onto I-590 N toward Downtown/Rochester. Take Exit 2 for NY-31/Monroe Ave toward Pittsford. Keep right at the fork and merge onto NY-31 E/State Route 31 E/Monroe Ave. Merge onto NY-31 E/State Route 31 E/Monroe Ave. Via Mina will be located on the left.

## From the East:

Take I-90 West to Exit 45 for I-490 toward Rochester. Exit 45 turns slightly right and becomes I-490 West. Take Exit 26 for NY-31 toward Pittsford. Turn right onto NY-31 W/State Route 31 W (Signs for New York 31 W). Via Mina will be located on the right.

## From the South:

Take I-390 N to Exit 15 to merge onto I-590 N toward Downtown/Rochester. Take Exit 2 for NY-31/Monroe Ave toward Pittsford. Keep right at the fork and merge onto NY-31 E/State Route 31 E/Monroe Ave. Merge onto NY-31 E/State Route 31 E/Monroe Ave. Via Mina will be located on the left.