



The AFP of Western New York presents its
December 2023 Meeting

In Partnership With



Thursday December 14, 2023
Located at Pane Vino on the Avenue

3400 Monroe Avenue, Rochester NY 14618
(585) 444 - 3573

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 1.2 CTP/CCM and 1.2 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

Program: 1:00 PM – 2:00 PM

Topic: Economic Update

Speaker: Stephen A. Rossi, Senior Vice President & Senior Equity Strategist – Canandaigua National Bank and Trust

Session Description: The presentation will include an economic and market overview as well as what to expect for the year ahead.

Speaker Information



Stephen Rossi
Senior Vice President & Senior Equity Strategist
Canandaigua National Bank and Trust

Stephen Rossi is a seasoned Wealth Management professional in Upstate New York. He leads a team of Wealth Advisors in the construction of model equity portfolios, considering macroeconomic, fundamental, and technical factors. Stephen actively manages a \$320 million investment portfolio for individuals, trusts, and corporations. He also assists clients with comprehensive financial planning to achieve their stated life goals. Stephen has over twenty-eight years of experience in the financial services industry, currently in wealth/asset management, but with prior experience in lending/liability management as well. Stephen holds MBA, CFA®, CFP®, and ChFC® designations.

Menu Information (In-Person Attendees)

Lunch:

- Warm Rolls and Butter
- Mesclun Salad
- Penne Vodka
- Greens and Beans
- Sausage, Peppers, and Onions
- Chicken French
- Assorted Cookie Platter
- Assorted Soda, Water, Coffee, Tea