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

In Partnership With

Wednesday, February 7th, 2024
Located at Casa Larga Vineyards

2287 Turk Hill Rd, Fairport, NY 14450

(585) 223 - 4210

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 3.6 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: Managing Liquidity Risk in the Year Ahead

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

Session Description: Corporate cash levels have remained elevated with continuing concern over the impacts of war, the economy, interest rates, inflation, and the banking system. As being 2024, how can we mitigate risk when managing cash and investments? In this session, ICD's Tom Severance will weigh in with a discussion on investment and technology trends that can help institutional investors consider their approach to liquidity management in 2024.

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.

Break: 2:00 PM – 2:15 PM

Session # 2: 2:15 PM – 3:15 PM

Topic: Proactive Threat Defense for Liquidity and Payments

Speaker: Viena Swierczek, Solution Engineer – Kyriba

Session Description: Up to 90% of CFOs and CIOs report payments and financial fraud attempts, and cyber threats are growing more complex with intelligent technology - making proactive fraud detection and response programs a top priority for CEOs and their boards. In this session, we will outline strategies to actively defend financial workflows and data from fraud and cybercrime to maximize protection end-to-end. Key discussion points:

- What sophisticated technologies are being used in cyberwarfare and fraud incidents
- The need for real-time fraud detection to protect liquidity
- Building connective tissue between your fraud and threat hunting programs
- Building the business case to invest in detection and response programs
- Opportunities for CFOs, CIOs and CISOs to heighten internal and external security

Speaker Information

Viena Swierczek
Solution Engineer - Kyriba

Viena Swierczek is a Solution Engineer at Kyriba, where she works with clients and prospects across various industries to identify their unique challenges and design tailored solutions. Viena began her career in finance at Goldman Sachs in New York City, later becoming a relationship manager at Capital Group working with high-net-worth investors. Driven by her interest in finance and passion for leveraging technology to streamline and enhance operational efficiency, Viena joined Kyriba in May of 2022, where she collaborates with global organizations to optimize their enterprise liquidity, payments, and risk management operations.

Break: 3:15 PM – 3:303 PM

Session # 3: 3:30 PM – 4:30 PM

Topic: Corporate Liquidity Strategies in 2024

Speaker: Liquidity Product Specialist – HSBC Bank, USA.

Session Description: With Fed cutting on the horizon this year, sound cash management is crucial to maximizing yield while also preserving capital and liquidity. The goal of this session is to provide HSBC Asset Management's macroeconomic and market outlook and discuss several effective liquidity strategies that should serve corporate treasurers well during 2024.

Speaker Information

Liquidity Product Specialist – HSBC Bank, USA.

The speaker is a short duration investment specialist at HSBC. He joined HSBC from KKR, where he served as the head of cash management within the firm's treasury department. The speaker has also spent 5 years in multi-asset portfolio management at a quantitative asset manager, and 5 years in sell-side interest rate research at J.P. Morgan, where his focus was primarily on short duration fixed income markets.

Menu Information (In-Person Attendees)

Lunch:

- Field Greens Salad with Two Dressings
- Fresh Baked Ciabatta Rolls with Whipped Butter
- Fresh Fruit Salad with Mixed Berries
- Antipasto Salad
- Colorful Sauteed Vegetable Medley
- Chicken French
- Chef Carved Pork
- Garlic and Parmesan Roasted Red Potatoes
- Farfalle with a Creamy Vodka Blush Sauce
- Water Station
- Assorted Soda, Coffee, Tea

Breaks:

- Cookies and Brownies
- Water Station
- Assorted Soda, Coffee, Tea

Happy Hour:

- Assorted Beer and Wine
- Hors D'oeuvres:
    - Imported and Domestic Cheeses with Crackers
    - Hot Parmesan Artichoke Dip with Toasted Baguette
    - Swedish Meatballs
    - White Cheddar Puffs with Green Onions
    - Puff Pastry Filled with Crab Salad