

FEDERATION of CREDIT
and FINANCIAL PROFESSIONALS

Credit & A/R Professional Retreat Day

Courtyard by Marriott, Montvale, NJ

Agenda

Thursday, November 17th

- 9:00 – 9:30am **Continental Breakfast**
- 9:30 – 9:45am **Welcome** – Lyle Wallis, President – *FCFP*
- 9:45 – 10:45am **Bullet Proof Guarantees** – David Mannion, Esq., Partner – *Blakeley, LLP*
Understanding the tools available to mitigate credit risk amongst our distressed business customers is critical. This session will take a look at these and discuss the potential pitfalls in creating and enforcing them. It will look at the necessary process involved in assuring that, in the event they are utilized to mitigate against the potential for bad debt, they will stand up if challenged in a court of law.
- 10:45 – 11:00am **Break**
- 11:00 – 12:00pm **Protecting Sensitive Information** - Rafael X. Zahraiddin-Aravena, Chairman - Bankruptcy & Restructuring Group - *Elliott Greenleaf*
Aaron L. Hammer, Partner - *Sugar Felsenthal Grais & Hammer, LLP*
Elizabeth (“Lisa”) Vandesteeg, Partner - *Sugar Felsenthal Grais & Hammer, LLP*
Information Security has become a critical issue in today’s electronic world. Access and retention of this type of information is critical to credit decisioning. Protecting this information is an essential role of the receivable management function. This session will explore means and methods that can be adopted to assure the security of sensitive information and compliance with related laws.
- 12:00 – 1:00pm **Lunch**
- 1:00 – 2:00pm **Electronic Invoice Presentment & Payment Initiative** – Todd Albers - Senior Payment Consultant – *Federal Reserve Bank of Minneapolis*
For obvious reasons the world is moving away from paper invoices and paper checks and replacing these billing and payment devices with electronic transactions. Commercial B2B transactions are lagging behind in adoption. An all-out effort, spearheaded by the Federal Reserve and the major banks, is under way to drive EIPP adoption. This session, presented by an expert from the Federal Reserve, will update you on the effort to move to EIPP and give you an insight into what you need to know as the movement to electronic B2B transactions evolves.

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- 2:00 – 3:00pm **Negotiation Skills** – Jessica Butler, President – *Attain Consulting*
The information you learn during this session might just change your life. Successful negotiations start with the proper preparation. The more you understand the situation and can anticipate the reactions and objections of the other party, the more prepared you will be to get the other side to see things your way and achieve more successful outcomes. During this discussion, you will be presented with tips, strategies & specific examples for improving communication and achieving increased success in negotiations with customers, suppliers, and even people in your own company (it also works with kids, spouses and friends!)
- 3:00 – 3:15pm **Break**
- 3:15 – 4:15pm **Data, Information & Knowledge - How Important in the Credit Decisioning Process** – Greg Powelson, V.P. Business Development – *AGA Adjustments*
Information is critical to managing an A/R portfolio. It plays an important role in assessing risk, measuring performance and developing an effective collection strategy. This session looks at sources of data and information and explains how to effectively harness them to create efficiencies in the receivable management process.
- 4:15 – 4:30pm **Closing Remarks**



FCFP wishes to give special thanks to AG Adjustments for sponsoring this event at no charge for our members & Invitees!

Discover the Benefits of Membership in the Federation of Credit & Financial Professionals

For additional information email:
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Or call

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