**2018 AFP of Arizona Desert Summit**

**Wednesday, September 19, 2018 – Desert Willow Conference Center**

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Track A

**A1- Women in Finance Panel Discussion**

Speaker(s):

Deborah Bateman, Professional Coach & Consultant, Risk Blossoming

Rev. Karen Russo, MBA, Money Coach, The Money Keys

Stefanie A. Layton, Director of Investor Relations, Pinnacle West Capital Corporation

**Deborah Bateman** epitomizes achievement, determination and kindness, professionally and personally. Her career has seen her rise from bank teller to executive while never losing the grounded perspective and touch that makes her a valued friend and mentor. Committed to developing individuals around her and helping them reach personal and professional goals, Deborah speaks from the heart when relating her own life experience to those who value her counsel.

Today, Deborah is President of Deborah Bateman LLC, a professional coaching and consulting organization, where she serves as a professional and certified leadership and executive coach.

**Karen Russo** holds an MBA from Columbia University and has extensive experience as a corporate trainer, top-selling sales person, and financial services professional. For 25 years Karen has designed and facilitated sales and leadership programs for The Forum Corporation, now Achieve + Forum, for clients such as Deloitte, DuPont, Fifth Third Bank, Kaiser Permanente, Roche, Sapient, Scripps, Visa, and Willis Towers Watson.

She has also delivered the acclaimed Consultative Approach workshop for Advance Consulting’s clients PeopleSoft, LAM Research, and Ultimate Software. Rev. Karen Russo, MBA has a special passion for showing individual contributor professionals how to adopt a customer-focused consultative approach to their clients and projects.

**Stefanie Layton** is Director Investor Relations for Pinnacle West Capital Corporation, the parent company of Arizona Public Service Company (APS). Ms. Layton is responsible for representing the Company’s interests in the investment community and fostering positive relations with institutional investors and industry analysts.

Ms. Layton joined APS in 2010. She previously served as Director Revenue Requirements, Program Manager – Operations and as a Senior Corporate and Securities Attorney. Among her responsibilities in those roles, she oversaw the Company’s revenue requirements formulation, transmission rates, and retail rate case management, managed compliance with the Securities and Exchange Commission and facilitated debt and equity financing transactions.

Prior to joining APS, Ms. Layton practiced as a corporate attorney at Snell & Wilmer in the Business and Finance department. She received her JD from Arizona State University and her BS in Accounting from the University of Arizona.

Session Description:

We will hear from women in the finance industry who have and continue to drive their own success and thrive in their various roles. Our panel will be moderated by Deborah Bateman, former banker and current coach & consultant, Risk Blossoming, and will feature Rev. Karen Russo, MBA, Money Coach and Stephanie Layton, Director of Investor Relations, Pinnacle West Capital Corporation. These women will discuss the biggest challenges in their career and leadership roles, how they overcame unforeseen or subtle obstacles, and much more.

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**A2- Beyond the buzz – Start your emerging technology preparedness**

Speaker:

Chad Dickson, SVP, Strategist, Treasury Insights Consulting Group- Treasury, Merchant & Payment Solutions- Wells Fargo

With more than 20 years of financial technology & strategy consulting experience, **Chad Dickson** connects emerging technology advancements from the Wells Fargo Innovations Group with their corporate customers to define the impact on their treasury and financial operations.

He joined Wells Fargo as part of the Wholesale Internet and Treasury Solutions group in 2006. As a leader within Solutions Group he managed a national team of consultants that is focused reengineering and optimizing the Accounts Payable and Accounts Receivable processes by removing costly manual functions and helping them to set a strategy to transition to next generation of payments.

Prior to joining Wells Fargo, Chad worked in the technology industry focused on deploying cutting edge financial services solutions with many of the world’s largest banks. He has launched & worked for companies such as Corillian Corporation and Metavante (FIS), Fiserv and EDS in global consulting and sales leadership roles.

Session Description:

The hype is all around us - accept a payment from your customer’s car, no swipe needed. Use Big Data to gain insights from your cash flows and your customer’s buying habits. Transfer assets and reconcile in real-time. Rapidly advancing technology is altering the way we do business, enabling us to increase convenience and relevance. What do we need to do to prepare for the new wave of tech? From the Internet of Things to blockchain and more, we’ll discuss how new technologies affect how companies do business and what treasury and finance departments should do to prepare.

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**A3- Navigating Cash Payment Solutions using Automation**

Speaker:

Lenny Evansek, SVP, SafePoint Business Development, Loomis US

**Lenny Evansek** is the SVP of Business Development at Loomis U.S. Lenny’s experience includes global supply chain, treasury management, cash logistics and automation from his experience at FedEx , Brink’s Inc., Fifth Third Bank, and Loomis.

Session Description: As cash in circulation continues to grow, so does the need to find ways to handle, manage, and deposit cash in the most efficient manner possible. With more options available today than ever before, we’ll explore the use case for automating cash management, the different options available in the market, and the impact it can have on your business.

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Track B

**B1- International Cash Management Can Be Worlds Apart from Domestic**

Speaker(s):

Jeremy Cogswell, PNC International Advisory Services

Colleen McMahon, Regional Sales Manager, SWIFT

Mike Lewis, Regional Sales Manager, SWIFT

**Jeremy Cogswell** is a member of PNC’s International Advisory Services team. In his role, he focuses on supporting corporate clients doing business internationally and assists them in formulating strategies to overcome any global challenges they may be facing. Jeremy has over 13 years of overall banking and treasury management experience. Prior to joining PNC, Jeremy spent over 10 years in roles spanning from portfolio management, client management, and international cash management sales for the Royal Bank of Scotland and ABN Amro.

**Colleen McMahon** is a Regional Sales Manager at SWIFT based out of the New York City office. Colleen is responsible for relationship management and business development with firms located between the Mississippi River and Rocky Mountains. Her clients include banks, corporates, and investment managers. Her duties include helping these clients leverage their SWIFT membership to obtain additional value for their organization.

**Mike Lewis**

Mike Lewis is a Regional Sales Manager for SWIFT based out of Park City, Utah. Mike is tasked with the sales and business development activities working with both corporate and banking organizations across his territory. His mandate includes helping these companies understand the value propositions for SWIFT's products and services as well as assisting customers with joining the SWIFT cooperative.

Session Description:

As companies expand their business internationally, they often struggle with decentralized processes and the complexities of navigating foreign payment systems, local bank capabilities, and individual market nuances – all of which can make it difficult for efficient cash management.

The goal of this session is to share some of the best practices and tools that are available to help companies strategically respond to those challenges and optimize their international bank partnerships, payments, collections and technology strategies.

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**B2- Virtual Card Payments and the Supplier Experience**

Speaker:

**Viki Snedden, VP, Boost Payment Solutions, Inc.**

Over 27 years in the payment industry, in 2017 **Viki Snedden** joined Boost Payment Solutions, Inc. which is fintech solely focused on the B2B space and solving problems for suppliers handling the virtual payment notifications. Boost is a nimble financial technology organization creating meaningful value and integrity to all stakeholders, optimizing commercial payments for buyers by solving issues and automating the entire Accounts Receivable and Reconciliation processes for suppliers. Prior to Boost, much of Viki’s career was with American Express leading a high performing team that managed a portfolio of third party acquiring partnerships and several of the disrupters entering the payment space and changing the buyer and seller experience.

Her experience in the payment industry spans from strategic relationship management with clients that span from enterprise level to start-ups. Viki has led Business Development and strategic account development with top payment networks, Processors, ISOs, Gateways, Payfacs, and industry disruptors like Uber, Stripe and AirBnB.

Viki enjoys the leading edge, and being involved in exploring how the payments industry has progressed through Electronic Data Capture, Fraud prevention, BIP, industry expansion like supermarket, healthcare, e-commerce, and globalization.

Proud member of Wnet, the women’s network in payments for several years, Viki served on the national planning committee, co-hosted a successful event in the American Express HQ in the World Financial Center, and is very active in the local Phoenix area chapter.

Viki sits on the Western States Acquirers Association since 2016 and was elected to Director in 2018.

Session Description:

What are Virtual Card Payments:

* How do they work
* What is the Supplier’s Experience
* Why are they not more readily accepted
* How can we solve for these issues

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**B3- BEC Scams and Mobile Banking Fraud: The Wild, Wild West of Financial Fraud**

Speaker(s):

Greg Litster, President and Founder, SAFECHecks

Corporate Practitioner (TBD)

**Greg Litster** is president and founder of SAFEChecks, and is editor of Frank Abagnale’s Fraud Bulletin.

Mr. Litster is a former banker of 18 years, has written articles published in AFP Exchange, American Payroll Association, American Land Title Association, and Sheshunoff’s Corporate Cash Management Manual. He has served as an expert witness on several national and international check fraud and embezzlement cases, and has spoken on fraud prevention across the country for numerous financial institutions and professional organizations, including AFP, GFOA, Texpo, SoCal Expo.

Mr. Litster earned a Bachelor of Science in Economics and an MBA in Finance, both from Brigham Young University.

Session Description:

Business Email Compromise (BEC) scams are exploding. They are often paired with wire fraud, payment diversion, and account takeovers. The rise in mobile banking and mobile Remote Deposit Capture (mRDC) has increased the complexity of check fraud. Very few organizations and bankers know how to recover losses caused by double-presentments.

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**General Session #1 –** Deborah Bateman, Professional Coach and Consultant- Risk Blossoming, presenting *“Creating Your Celebrity!”*

Learn how to:

* take yourself and your business to a new level
* go from searching for clients to having clients seek you out, and
* become the "go-to" person in your industry

During this presentation, Deborah will share and expand on the four material key elements to creating one's personal brand and celebrity.

* Authenticity
* Visibility and Accessibility
* Brand Amplification

Giving Back and Putting a Halo on Your Brand

**Deborah Bateman** epitomizes achievement, determination and kindness, professionally and personally. Her career has seen her rise from bank teller to executive while never losing the grounded perspective and touch that makes her a valued friend and mentor. Committed to developing individuals around her and helping them reach personal and professional goals, Deborah speaks from the heart when relating her own life experience to those who value her counsel.

Today, Deborah is President of Deborah Bateman LLC, a professional coaching and consulting organization, where she serves as a professional and certified leadership and executive coach.

As a third generation Arizonan, Deborah takes great pride in her State and its history. Her diverse career has spanned more than 40 years, and includes both entrepreneurial and corporate leadership roles. Her career has included roles within large national financial services organizations, community banks, and as the President of The Bateman Group, a consulting firm which provided consulting and regulatory liaison services to financial organizations and their board of directors. Currently, Deborah serves as the Vice Chairman of the Board of Directors for National Bank of Arizona.

Deborah is a graduate of the Pacific Coast Banking School at the University of Washington. Her thesis, “DeNovo, The Organization of a New Independent Bank,” is part of the school’s permanent research library. She is also a graduate of the American Institute of Banking, Mesa Community College, and Darden’s Leadership Development Program at the University of Virginia. Her several professional certifications include being a Certified Hogan Assessment Coach, Certified Project Manager (CPM) and a Certified Treasury Professional (CTP).

Deborah has a breadth of experience which includes leadership positions in Executive Leadership, Wealth Management, Retail Banking, Systems and Operations, and Program Management. In addition, she is a seasoned and experienced corporate board member. She is an active member of her community, where she has served on more than thirty nonprofit boards. Currently, she serves on the Board of Directors for the Sandra Day O’Connor Institute, The American Heart Association, the Arizona Historical Society, and the Advisory Boards for Mesa Community College, Foundation for Living Medicine, and AZ Business Angels Magazine. Deborah is a member of Charter 100 AZ, and the American Heart Association - Phoenix Heart Ball Committee. In addition, she is featured columnist for [SmartFem.com](http://smartfem.com), and has been a popular and successful Charity Gala and Event Chairperson.

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**General Session #2** “Focus on the Treasurer” Panel Discussion

A discussion on the top issues facing Treasurers as they navigate an ever-changing business environment. A top-level panel of treasury experts will give their perspective on a variety of topics.

Moderator: Scott Barker-Manager of Finance, Priority Ambulance

Panelists:

* Risa Dagenart-Vice President/Controller, Docutech, LLC
* Lisa Murphy-CFO, The School of Architecture at Taliesin
* Jack P. Spitzer, MBA- Senior Vice President of Finance & Treasurer, Plexus

**Scott Barker- Manager of Finance, Priority Ambulance**

Scott has over eighteen years of experience with increasing responsibilities in financial and operations management, with an emphasis in healthcare management. He is a recognized leader with demonstrated abilities to develop and implement innovative solutions to complex problems.

**Risa Dagenart- Vice President/Controller, Docutech, LLC**

As VP and Controller at Docutech, Risa Dagenhart is responsible for overseeing and maintaining the company’s financial, accounting, tax and treasury operations. With over 10 years of experience in high-growth services companies, she has helped global organizations grow and scale their accounting operations.

Prior to joining Docutech, Risa served in a variety of leadership roles at leading companies, including Continuum Epam, Avenue5 Residential and Gazelle.com. Risa also earned her bachelor’s degree in Business Management as well as her MBA and Master’s in Accounting.

**Lisa Murphy- CFO, The School of Architecture at Taliesin**

Lisa joined the Frank Lloyd Wright Foundation in 2010 and served as the Foundation's Chief Operating Officer and Vice President of Finance from December 2011 to June 2017. As COO/VP of Finance she was responsible for Arizona Tour Operations, Collections, K-12 Education Programming, Human Resources, Finance, and Information Technology. With the legal separation of the 85-year-old graduate School of Architecture at Taliesin founded by world renowned architect Frank Lloyd Wright, Lisa became the first CFO for the new legal entity.

Combining her passion for public and charitable service, Lisa has devoted her entire 20+-year career to working with and for governmental and non-profit entities. Lisa’s experience includes extensive external audit and consulting work for governments and nonprofits as well as seven years serving the City of Scottsdale Financial Services Department in various finance capacities including the Accounting and Tax Audit Director position. Lisa holds a Bachelor’s degree in Accounting from the University of Arizona, and an MBA from Arizona State University and is a Certified Public Accountant licensed in the state of Arizona.

**Jack P. Spitzer, MBA- Senior Vice President of Finance & Treasurer, Plexus**

Jack joined Plexus in 2018. Jack’s team has responsibility for global treasury, including liquidity, bank relationship management, investments, cash flow forecasting, foreign exchange and risk management, debt, merchant services, fraud prevention, payables/receivables and corporate card program management.

Prior to joining Plexus, Jack was at Isagenix International for 5 years as VP of Finance and Treasurer. He was at Starwood Hotels and Resorts Worldwide for 15 years as their Assistant Treasurer, Global Treasury where he oversaw Treasury, Merchant Services and Receivables both domestically and internationally. He also has background in Corporate Accounting, IT and Six Sigma.

In 2010, Jack’s team was awarded Treasury Today’s Adam Smith Award in London for Top Treasury Team for their work on several innovation projects. He was also featured in AFP’s Exchange magazine and has contributed to several articles. Jack holds a BS in Organizational Leadership and Management from Franklin University and a Masters in Business Administration from Arizona State University.

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**General Session #3** David William Lee, presenting "*Creating a Responsive Finance Organization"*

Speaker: David Lee, MSS Business Transformation Advisory Institute- **Ignite Change** from Strategy to Action

**David Lee** has led transformation, facilitated innovation, and taught change management across the globe. He speaks and facilitates advanced programs on Responsive leadership, transformation, and innovation at Fortune 50 enterprises, state & city government, among others. He is Executive Director of the MSS Business Transformation Institute, a founding member of ResponsiveOrgPHX, and on advisory councils at Thunderbird, GCU, and NAU.

Session Description: As the world gets more volatile and uncertain, managing complexity becomes the biggest unmet challenge of modern business. David provides the approach and practical application to make this transformation from his real-world experiences managing global organizations.