

# 2023

# OHIO

# ANNUAL MEETING

## MEETING AGENDA

- **IN-PERSON**

- Courtyard by Marriott Cleveland  
Airport North  
24901 Country Club Boulevard  
North Olmsted, Ohio 44070

- **TUESDAY**  
**JUNE 20**

- **SPOTLIGHT SPONSOR** 

# 2023 CLEVELAND OH

# TUESDAY JUNE 20 9 AM – 5 PM EST

## SPONSORS

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## ALL REGISTRATIONS ARE TAKEN ONLINE AT

[nacmconnect.org/annual-meetings](http://nacmconnect.org/annual-meetings)

**While registering online, you will have the opportunity to choose your payment method. We are happy to take a credit card online or invoice you. You will also have the opportunity to apply coupons as allowed.**

**Cancellation Policy:** Cancellations must be received in writing, via email or mail no later than two weeks prior to the meeting date to qualify for a full refund. Cancellations received later than two weeks prior to the meeting date DO NOT qualify for a refund of registration fees. Substitutions are allowed. Sorry, phone cancellations cannot be honored.

**QUESTIONS?** Please contact Lillian Novak at [lillian.novak@nacmconnect.org](mailto:lillian.novak@nacmconnect.org)

CEU points and CCE recertification points are available for all educational sessions.

**9:15 – 9:30 A.M.**  
**OPENING REMARKS**

*Phil Lattanzio, CCE, President & COO, NACM Connect*

**9:30 – 10:30 A.M.**  
**CREDIT APPLICATION REVIEW**

*Donald Mausar, Shareholder Weltman, Weinberg & Reis Co., L.P.A.*

Credit application drafting and review – this program will be a fast paced review of general credit application components, terms of service, credit reference verification techniques, and understanding the value of credit application as part of any credit extension. One (1) Hour of information that can be used daily as a credit manager or any team member in the credit extension process. Can a credit application act as contract binding the parties?

**10:45 A.M. – 12:00 P.M.**  
**CASES UNDER SUBCHAPTER V OF THE  
BANKRUPTCY CODE: BENEFITS AND PITFALLS  
FOR TRADE CREDITORS**

*Jason Torf, Partner, Tucker Ellis LLP*

New Subchapter V was added to the Bankruptcy Code in 2020 to create a more efficient and economical process for small business debtors to reorganize. But the benefits to a Subchapter V debtor come at a cost to trade creditors. While Subchapter V makes it easier for small business debtors, it also impacts the rights that creditors have versus a traditional Chapter 11. In this session, our presenters will explain and analyze various aspects of the new Subchapter V, including eligibility requirements, differences from a traditional Chapter 11 case, the impact of Subchapter V on trade creditors, and how Subchapter V has worked out thus far.

**1:00 – 2:00 P.M.**  
**ECONOMIC UPDATE | VIRTUAL PRESENTATION**

*Chris Kuehl, Aramda Corporate Intelligence*

NACM Connect's members favorite economist will be sharing his insights into the current state of the economy. Where are we on inflation? Employment? Interest rates? As always, Chris will be adding his twist of humor to this all important subject.

**2:15 – 3:15 P.M.**  
**HOW TO MAKE A CONFIDENT CREDIT DECISION**

*Caroline Perkins, CCE, Mickey Thompson Performance Tires*

In an interactive workshop, random scenarios for credit requests will be worked out by the attendees with the assistance of the panel. Join us for what promises to be a fun session that will test what you know about credit decisions while learning new ways to assess your customer's requests.

**3:30 – 5:00 P.M.**  
**NETWORKING EVENT**