

2023

NEW YORK

ANNUAL
MEETING

MEETING AGENDA

• **TUESDAY**
JUNE 6

• **IN-PERSON**

Marriott Courtyard Brighton
33 Corporate Woods
Rochester, NY 14623

2023 ROCHESTER NY

TUESDAY JUNE 6 9 AM – 5 PM EST

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**ALL REGISTRATIONS ARE
TAKEN ONLINE AT**

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

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.
ROUNDTABLE DISCUSSION – THE ART AND
SCIENCE OF STAFFING YOUR CREDIT TEAM**

*Leslie Harrison, CGA, SPHR, Vice President
Membership, Human Resources and Staffing,
NACM Connect*

Finding and retaining talent for your credit department is becoming more and more of a challenge for many companies. Is telecommuting becoming a help or a hindrance? What about other post-pandemic employee demands? In this roundtable we will share some tricks of the trade from our expert and share your frustrations and successes.

**10:45 A.M. – 12:00 P.M.
CREATING A CREDIT APPLICATION THAT
CAN WITHSTAND THE DEPTHS OF TIME
AND LAWSUITS: THE TOP 10 THINGS YOUR
COMPANY'S CREDIT APPLICATION SHOULD
CONTAIN (OR NOT) – AND WHY**

*Wanda Borges, Principal Member
Borges Associates PLC*

Today's credit application is a far cry from the simple half-page document of years gone by. Laws are continually changing requiring tweaks to existing language. We are living in a world of electronic transactions which have very specific requirements. Creditors want a credit application that can serve as a binding contract. This program has been created for new credit managers who need to learn the fine art of credit applications as well as experienced credit managers who need to remain up to date on laws requiring changes or additions to existing verbiage. This presenter will also discuss why some provisions should **not** be included in a credit application Top Ten items to be discussed will include the cardinal rule of credit, statutory compliance, personal guaranties, security interests under UCC Article 9 and electronic transactions.

**1:00 – 2:00 P.M.
COLLECTION TECHNIQUES – BEST PRACTICES**

Caine & Weiner

In this session our partner, Caine & Weiner, will share their best practices for collections including what has changed in the past three years. With so many people working remotely, the challenges have changed and, therefore, so too have some of the tricks of the trade. Tried and true techniques will also be discussed.

**2:15 – 3:15 P.M.
ECONOMIC UPDATE | VIRTUAL PRESENTATION**

Chris Kuehl, Armada 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? Banking? As always, Chris will be adding his twist of humor to this all-important subject.

**3:30 – 5:00 P.M.
NETWORKING EVENT**

If you want to register for the Business Meeting **only** please contact Brittany Siriann at brittany.siriann@nacmconnect.org.